Saint Michael's College
Job Description

Job Title: Director for Planned Giving

Department: Institutional Advancement

Supervisor or Manager: Associate VP for Alumni Relations and Development

Date Created: 7/25/05 Last Revised: 7/25/05 FLSA Status: E

Approved by (print name): ________________________  Signature: ________________________

Our Mission: It is the mission of Saint Michael’s College to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

Major Objectives of the Position:
• All aspects of the planning, implementation, administration, and operation of a comprehensive gift planning program are managed
• Gifts with complex assets are structured
• Planned gift prospects are identified, cultivated, and solicited
• An overall marketing strategy in support of the program is developed
• Policies and procedures for the acceptance, crediting, and handling of complex gifts are developed and maintained
• The mission of the College is well understood, articulated in an eloquent and compelling way and reflected in all manners of job duties including visits, events, phone calls, personal correspondence, and proposals
• The SMC mission is effectively promoted and the IA mission is supported to build life-long relationships with alumni, parents and friends, and to engage alumni and friends of the College as active volunteers and benefactors
• IA policies are adhered to regarding confidentiality of prospect information and database integrity

Essential Duties and Responsibilities:
• Establishes goals and objectives for the planned giving program; reviews program progress periodically and revises program policy and promotion strategy as needed
• Develops and implements marketing strategy for the planned giving program
• Tracks, maintains, and stewards completed planned gifts and planned giving donors
• Coordinates special events for planned giving prospects and donors
• Solicits and structures outright and planned, non-traditional gifts
• Serves as resource for other members of the staff soliciting and negotiating complex gifts
• Identifies, cultivates, solicits, and stewards planned gift prospects for gifts in excess of $10,000
• Approaches a target of 120 alumni, parents and friends on an annual basis for the purpose of identifying, qualifying, cultivating, and soliciting gifts, i.e. planned or current leadership gifts
• Drafts gift planning proposals for major donors
• Collaborates with development officers in the cultivation and solicitation of individual donors
• Works with donors and their financial advisors to provide them with gift and estate planning techniques to maximize their philanthropy and minimize their estate and income tax liabilities
• Provides gift and estate planning training to fundraising staff
• Serves as technical advisor to special gift officers and other development staff on current tax laws as they relate to charitable giving and general estate planning techniques
• Researches, and when necessary, obtains legal opinions on tax and legal ramifications of complex gifts
• Develops and maintains gift acceptance policies and procedures
• Serves on Gift Acceptance Committee and maintains the flow of information to and from the committee
• Creates and maintains gift credit policies for non-traditional gifts as they relate to legal credit, gift club credit, reunion credit, and campaign credit
• Maintains current knowledge of IRS and other regulations, trends, and issues concerning estate and outright gifts
Secondary Responsibilities:
• Retains active membership in planned giving groups and other appropriate planned giving networks
• Assists in staffing Reunion and Homecoming weekends
• Performs other duties and assignments as assigned

Positions Supervised:
• None

Position’s Major Contacts:
• Special Gifts Officers
• Other Development Staff
• Prospects/Donors
• Outside Legal Professionals (Legal, Investment, Tax)
• SMC Financial Managers

Demonstrates Excellence in this Position:
• Shows a steadfast commitment to participating as a member of a fully integrated outreach and development team
• Regularly explores opportunities for increasing the breadth and success of the planned giving program
• Astutely analyzes trends of planned gifts as a percentage of total gifts as reported by CASE and sets realistic goals for the program based on information obtained
• Identifies appropriate target markets to focus efforts to solicit planned gifts and creates effective plans to reach this constituency
• Thoroughly understands tax and legal aspects of charitable gift planning
• Presents gift planning concepts with credibility and authority
• Elicits support of senior management to integrate planned giving into all functions within the IA Office, including Special Gifts, Annual Fund and the Reunion program
• Develops realistic operating budget to support marketing and other activities and strategically promote planned gifts to the appropriate target markets
• Creates smart reporting systems that allow tracking of planned gifts to evaluate the effectiveness of the program including current activity, face value of gifts, discounted present value, and anticipated maturity dates
• Annually evaluate program to determine effectiveness of efforts, and implement changes for new fiscal year if necessary

Education and Work Experience Required:
• Bachelor’s degree with experience relevant to the position, including four years of fundraising, marketing, or management
• Knowledge of financial markets and legal and tax related aspects of charitable giving

Analytic Skills Required:
• The ability to use various analytical techniques to identify cause-and-effect relationships and then develop plans to change a situation.

Language and Literacy Skills Required:
• Reads and interprets a wide range of information. May interpret documents to others. Regularly writes reports and correspondence. Able to shift writing style as needed for different audiences. Regularly explains policies, listens to questions, responds, and problem solves. Speaks to individuals and small groups effectively.

Computer/Technology Skills Required:

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___None ___ working knowledge ___ intermediate ___ highly proficient
Adobe Acrobat
___None ___ working knowledge ___ intermediate ___ highly proficient
Quark
___None ___ working knowledge ___ intermediate ___ highly proficient
Datatel
___None ___ working knowledge ___ intermediate ___ highly proficient
Internet Research ___None ___ working knowledge ___ intermediate ___ highly proficient

**Licenses, Certifications and Other Requirements:**
- Must meet driver’s eligibility requirements as stated in the Saint Michael's College *Vehicle Use Policy*

**Physical Demands:**
Work is often performed in a typical office environment requiring:
- Sitting in a normal seated position for extended periods of time
- Reaching by extending hand(s) or arm(s) in any direction
- Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard
- Communication skills using the spoken word
- Vision sufficient to see within normal parameters
- Hearing sufficient to hear within normal range
- No or very limited physical effort
- No or very limited exposure to physical risk

While performing the duties of Director for Planned Giving, the employee must occasionally lift and/or move 10-25 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential functions.

**Additional Requirements for the Job:**
- Capacity to manage multiple projects with effective organizational, interpersonal and communication skills
- Ability to interact professionally with the College’s financial, academic, and development officers and wealthy prospects and their advisors
- Availability for overnight travel which requires independent navigation such as following and mapping directions, driving, air travel
- Willingness to work the hours necessary beyond the regular schedule to complete job responsibilities, assist in staffing Reunion and Homecoming weekends, and participate at Commencement, convocations and other College events as defined by supervisor and responsibilities of this position

The above job description in no way states or implies that these duties are the only duties performed by this employee. The incumbent is expected to perform other related duties necessary for the effective operation of the College.