



JOB DESCRIPTION

TITLE: Director of Planned Giving

DATE: November 13, 2019

DEPARTMENT: Development

SUPERVISOR: Senior Director of Development

FLSA Classification: Exempt

SUMMARY:

The Director of Planned Giving is responsible for managing and overseeing the planned giving program and Rockmore Society, a legacy recognition membership. Reporting to the Senior Director of Development, this position will establish program priorities and strategy in coordination with the Marine Corps Scholarship Foundation's organizational goals and The Honor & Educate Campaign.

Serving as the Scholarship Foundation's lead generator of planned gift commitments, the Director is expected to be the subject matter expert on deferred and non-cash methods of giving and drive the strategy, solicitation, forecasting and reporting of planned gifts and prospects.

The Director of Planned Giving will work with the Directors of Development to assist in strategy and execution of solicitations within each major gift portfolio; while maintaining a portfolio of planned giving prospects including the identification, cultivation, solicitation, and stewardship. As such, the Director should possess a demonstrated ability to build relationships with donors and prospects that lead to major, blended and planned gifts.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Donor Management

- Identify planned giving prospects and further utilize research from prospect scoring and gift data to continually monitor donors and new prospects
- Disseminate prospects and planned giving related information to Directors of Development and serve as subject matter expert to development staff

- Contact all direct mail responders that indicate an interest in making a planned gift and ensure proper follow up or adjust database management of donors based upon responses

Solicitation

- Generate \$600,000 in booked revenue from realized estate commitments, irrevocable deferred commitments (CGAs, DCGAs and Irrevocable Remainder & Lead Trusts) and outright gifts (cash, securities and non-cash assets)
- Secure \$2,400,000 in revocable deferred commitments to include bequests in wills and revocable trusts and beneficiary designations in retirement plans or insurance policies.
- Maintain and establish relationships with current and new investors by making a minimum 12-16 visits per month.
- Proactively cultivate prospective planned gift investors identified through research
- Work with direct mail vendor to create and manage planned giving mailings throughout the year designed to identify planned giving prospects and generate leads
- Conduct all follow up calls, visits and correspondence based on responses to mailings and leads generated by staff and volunteers, and requests for information from prospective investors
- Utilize PG Calc or other software to provide gift illustrations and options to prospective donors and staff

Database Maintenance /Administrative

- Ensure proper data entry of planned gifts received and maintain tracking of planned giving gift details within Raiser's Edge
- Maintain Prospect and Solicitation Tracking system in Raisers Edge
- Secure testimonials of planned giving donors and provide updated content for use in communications materials, including web.
- Produce performance reports and track progress with prospects and solicitation to forecast revenue
- Track and submit required compliance reports to states that require documentation for CGAs

EDUCATION AND/OR EXPERIENCE:

- Bachelor's degree, Master's degree preferred
- 3-5years of planned/estate giving related experience
- Substantial experience with a major fundraising database (Raiser's Edge a plus)
- Experience with PG Calc, Crescendo or other gift illustration software
- Proven track record of success building donor relationships and closing gifts

REQUIRED SKILLS AND ABILITIES:

- Excellent communication, solicitation and interpersonal skills

- Highly energetic and a proactive relationship builder, capable of nurturing key existing relationships while cultivating new ones to promote philanthropic success
- Strong analytic skills required to establish strategic fundraising goals and report results
- Strong organizational and time management expertise
- Must possess a passion for the Marine Corps Scholarship Foundation
- Embrace and promote working in a collaborative environment with colleagues and Foundation leadership

WORKING CONDITIONS:

- Working conditions are normal for an office environment
- Travel and weekend/evening work required

Interested candidates should submit their resumes to employment@mcsf.org