

Job Description

Job Title: Planned Giving Manager

Department: Development

Physical Strength: Moderate

Reports To: Executive Director of Development and Communications

Job Status: Regular/Full-time (40 hours/week)

FLSA Status: Exempt

SUMMARY

Reporting to the Executive Director of Development and Communications, the Planned Giving Manager will lead, coordinate and manage all aspects of Legacy Society fund development for Mount Angel Abbey and Seminary, including research, initial contact, relationship development, qualification of interest and capacity to make a planned gift, direct solicitation, and closing of commitments from prospective and current donors. This person creates and implements annual plans for Legacy Society marketing, stewardship, recognition, and communications via print and online media, working towards specific fundraising goals and metrics for the Legacy Society.

In addition, the Planned Giving Manager assists with targeted major gift development and solicitation, especially related to campaigns and endowments, and where such efforts coordinate with Legacy Society cultivation. Collaboration with other development team members will be expected. This position involves a high degree of financially sensitive and confidential interpersonal work and requires exceptional attention to detail and ethical conduct. Familiarity with relevant tax laws and financial instruments related to planned giving is preferred. Some travel for donor meetings and cultivation events may be required.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Note: While this listing is a comprehensive representation of essential duties of the position, it is not necessarily all-encompassing and additional duties may be assigned as needed to meet Department and/or Abbey needs.

Program Strategy and Management:

- Design, implement and oversee the Abbey's planned giving program.
- Set goals for planned gifts; evaluates progress toward goals; prepares periodic reports on metrics and fundraising; reports, as needed, to the Abbey Foundation of Oregon (AFO), Hilltop staff and Abbey leaders.
- Develops planned gift pipeline by working through a "moves management" process involving identification, cultivation, solicitation, and stewardship stages with additional identified prospects.
- Annually reviews and updates the Abbey's gift acceptance, stewardship and gift counting/reporting policies, as it relates to planned giving. Ensures all planned gift arrangements adhere to the Abbey's gift acceptance policies and relevant legal and ethical standards.
- Ensures planned giving coordination in the Development and Communications Departments with other fundraising and communication activities.

Donor Engagement and Cultivation:

- Identifies, cultivates, solicits and stewards Legacy donors and prospects, seeking to balance stewardship activities with current members and recruiting new Legacy commitments.
- Schedules 3-5 visits per week to solicit major and planned gifts. Manages prospect lists and research, develops and executes targeted cultivation plans, solicitation strategies and stewardship activities for a range of prospects.
- Leads the staff, board members and volunteers in their gift approaches and development efforts; creates outlines and talking points for planned gift cultivation.
- Identifies, informs and collaborates with agents of wealth (attorneys, accountants, trust officers, financial advisors, etc.).
- Maintains contact with Legacy Society donors and those who have established endowed funds, sending annual update letters about progress and impact, and (as appropriate) balance statements.
- Frequently interacts with individuals both within and outside of organization.

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Marketing and Communications:

- Works with the Communications Team (and/or vendor) to create and implement a planned giving marketing plan, including a newsletter, print and digital collateral, ongoing correspondence, and a robust online presence via website, and social media.
- Maintains and enhances the Legacy Society as a recognition strategy for donors.
- Ensures exceptional donor acknowledgement, stewardship and public recognition, as appropriate.

Gift Administration and Processing:

- Prepares planned gift proposals using the planned giving software, designs cover letters for proposals and identifies options for donors.
- Enters call reports into Raiser's Edge (NXT) following contacts with donors and prospects. Manages input of planned giving information into the database and creates a tracking program. Maintains proficiency in planned giving software.
- Creates a stewardship plan to maintain ongoing relationships with donors who have made planned gift commitments. Supervises the recording and acknowledgement of planned gifts and intentions.
- Oversees and coordinates procedures for the administration of planned gifts (business office, investment policy, payment schedules, tax reporting, government compliance, etc.) Collaborates with the Finance Office on the administration of planned gifts and bequests.
- Ensures that incoming bequests are processed properly: including that the donor's restrictions are honored, estate distribution form is completed, bequest report is updated, other documentation is completed, and acknowledgements are sent. Completes and returns all paperwork/forms with signatures required for claiming beneficiary gifts.
- Prepares and presents charitable gift annuity contracts. Updates written processes as needed.

Collaboration and Leadership:

- Works with colleagues to conduct prospect research and coordinate wealth screening.
- Supports planned gifts as part of the capital campaign.
- Works with the Executive Director to identify and take responsibility for a targeted list of assigned prospects for major and foundation gifts. Includes prospects in an annual work plan along with Legacy prospects, moving them through the "moves management" cycle.
- Works with the Executive Director to design and implement campaign strategies, ranging from communication and solicitation to stewardship.
- Staffs the Endowment Review Committee. Works with the procurator, controller and database manager to create agendas for this committee. Implements assigned outcomes.
- Reports to the Seminary Board and the Abbey Foundation of Oregon as to the status of endowments. Meets annually with the Seminary staff to organize student scholarships and provides contact information for student thank you letters.
- Ensures that endowment agreements are properly written, approved and recorded. Maintains endowment files. Works in concert with other members of the committee to ensure the endowment database has current and correct information
- Creates a stewardship plan to maintain ongoing relationships with donors who have made planned gift commitments.

Professional Development and Other Duties:

- Joins and attends professional groups and educational sessions as needed; stays informed about current trends in planned giving.
- Performs other duties as assigned in the best interest of maintaining and preserving the mission, vision and culture of Mount Angel Abbey.

SUPERVISORY RESPONSIBILITIES

None.

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QUALIFICATIONS

Ability to perform essential job duties with or without reasonable accommodation and without posing a direct threat to safety or health of employee or others. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Excellent problem solving, project management, training, speaking and motivational skills.
- Ability to interact professionally with stakeholders and demonstrate good judgment.
- Demonstrated self-confidence, diplomacy, intellectual curiosity and a passion for building a culture of philanthropy at Mount Angel Abbey.
- Demonstrated ethic of accountability in the workplace; experience maintaining strict confidentiality and discretion.
- Ability to support others' objectives as his/her own.
- Requires excellent judgment, communication skills, and personal commitment to outstanding customer service.
- Must be a self-starter with the ability to work both independently and as a member of a team.
- Ability to take initiative on projects as directed and demonstrate excellent time management skills, while demonstrating a high degree of flexibility, adaptability and the ability to prioritize tasks and simultaneously focus on multiple projects and deadlines.
- Strong attention to detail management and organization, with a 'process quality' mindset.
- Strong oral and interpersonal communications skills and phone etiquette, with a demonstrated ability to interact with a variety of individuals from a diverse variety of backgrounds and cultures, at all levels of the organization.
- Ability to thrive in a dynamic and friendly environment characterized by growth and change.
- Ability to maintain a positive work atmosphere by demonstrating a pleasant and hospitable demeanor and acting/communicating in a manner which facilitates positive working relationships with customers, volunteers, monks, co-workers and organizational leadership.
- In order to provide our guests and employees with a pleasant and friendly experience, while at work the employee is expected to be free of any discernable smells or scents, including but not limited to tobacco, body odor, or personal care products/fragrances.
- Must have working knowledge of the Catholic Church. An understanding of a Catholic Abbey and Seminary helpful.
- Ability and willingness to travel occasionally, especially throughout the Portland Metro area.
- Must be available for occasional weekend and/or evening work.
- Regular and predictable attendance is an essential function of the job.

EDUCATION and/or EXPERIENCE

Any combination of education, training or experience that provides the knowledge, skills and abilities required to perform the essential functions of the position.

- Bachelor's Degree required. Master's, or other advanced degree a plus.
- Minimum five years of experience in fundraising and planned giving; experience should include a range of fundraising responsibilities that include management of fundraising processes. Planned giving experience preferred.

LANGUAGE SKILLS

Excellent verbal and written communication skills.

MATHEMATICAL SKILLS

Solid basic math skills.

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COMPUTER SKILLS

- Strong computer skills, including advanced knowledge of Microsoft Office (Excel, Word and PowerPoint), database expertise and use of the Internet.
- Familiarity with fundraising recordkeeping, software, and databases.

CERTIFICATES, LICENSES, REGISTRATIONS

Must possess a current, valid Oregon driver's license with a clean driving record in order to be covered on Abbey auto insurance.

PHYSICAL DEMANDS

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 disabilities to perform the essential functions.

- Ability to regularly sit, stand, bend, stoop, and occasionally reach overhead.
- Will frequently (several times per week) lift small boxes weighing up to 15 pounds.
- Will occasionally enlist assistance help in lifting larger objects (i.e. boxes of paper, envelopes, etc.) weighing up to 50 pounds.

WORK ENVIRONMENT

Office environment.
