

University of Minnesota Foundation

Position Description 9-21-2009

Position Title: Planned Giving Officer
(University Classification #9717 – *Development Officer*, P&A, annually renewable appointment)

Position #: 216353

Requisition #: 163327

Department: Planned Giving

Reports to: Director of Planned Giving

General Description:

As a member of the professional Planned Giving development team, this position contributes to the marketing, cultivation, solicitation and stewardship of planned gifts to increase both the quantity and size of estate, life-income, and other planned gifts in support of the University of Minnesota Foundation. In a highly collaborative environment, this individual will be expected to coordinate efforts with unit based development officers, central development professionals, and other University staff where appropriate.

Areas of Responsibility:

1. Planned Gift Cultivation and Solicitation
 - a. Build and maintain relationships with a portfolio of assigned planned gift donors and prospects. Manage in varying stages of involvement a caseload/portfolio of prospects and donors to ensure that timely steps are taken toward solicitation.
 - b. Make solo and joint (with development colleagues) contacts with prospects to counsel and assist them in their charitable gift planning; design and present planned gift illustrations.
 - c. File periodic electronic contact reports on donors and prospects contacted and participate in team prospecting analysis and strategy meetings.
2. Planned Gift Education, Planned Giving Expertise, and Other Responsibilities
 - a. Provide planned gift expertise to Foundation staff and regional/campus/ collegiate development officers, both individually and by making educational presentations to development staff.
 - b. Collaborate with department colleagues to develop and present planned gift educational programs for development officers and staff.
 - c. Maintain proficiency in the latest planned giving vehicle features and charitable gift law changes.
 - d. Utilize Crescendo© planned gift software programs to develop gift illustrations for presentation to prospects and donors.
3. Planned Gift Marketing
 - a. In collaboration with Communications and department colleagues, provide input to planned gift marketing materials and strategies, including: developing key educational messages, identifying target audiences, and selecting donors to be profiled.
 - b. In collaboration with Communications and department colleagues, coordinate the publication of planned giving newsletters and other periodic marketing pieces.
 - c. Make presentations to alumni, staff and faculty, and other audiences on estate and gift planning related topics.

4. Planned Gift Stewardship and Other Initiatives
 - a. Participate in annual Heritage Society event planning and execution.
 - b. Initiate and monitor stewardship activities for assigned planned gift donors in portfolio.
 - c. Collaborate with Donor Relations and development colleagues to facilitate stewardship activities for all Heritage Society members.
 - d. Perform other projects, committees and task forces at the Foundation as assigned by the Director of Planned Giving.

Qualifications:

- Bachelor's degree required, advanced or professional degree preferred.
- Minimum five years of previous experience in planned giving or closely related field such as estate planning, trust management, or development/fundraising with strong emphasis on planned giving activities.
- Prefer demonstrated leadership experience in either a professional or volunteer organization setting and campaign-related planned giving or major gift fundraising experience within a higher education environment.
- Demonstrated excellent writing, editing, research and presentation skills. Excellent attention to detail and demonstrated analytical and problem-solving skills.
- Demonstrated intermediate level experience using Microsoft Office software, including Word, Excel and PowerPoint.
- Ability to work effectively in a complex environment and to collaborate with others to meet donor needs. Excellent interpersonal skills, with the ability to establish and maintain relationships at all organizational levels. Ability to take initiative and function independently and as part of a team.
- Familiarity with the University of Minnesota and its alumni, is a plus.

American with Disabilities Act (ADA) Requirements:

Office environment including standing and sitting at desk, use of PC, occasional lifting of approximately 10#.

Background Check Requirement:

Employment is contingent upon a satisfactory background check. A satisfactory background check is the absence of a criminal record which bears a demonstrable relationship to the applicant/employee's suitability to perform the required duties and responsibilities of the position.

This is a 12 month, 100% time, annually renewable appointment; salary to commensurate with experience and qualifications.

Application Instructions:

Please apply online through the University's Online Employment System at:
<https://employment.umn.edu/applicants/Central?quickFind=83321>

University of Minnesota Foundation
McNamara Alumni Center
200 Oak Street SE, Suite 500
Minneapolis, MN 55455-2010
Email: umfjobs@umn.edu
www.giving.umn.edu

The University of Minnesota is committed to the policy that all persons have equal access to its programs, facilities, and employment without regard to race, color, creed, religion, national origin, sex, age, marital status, disability, public assistance, veteran status, or sexual orientation.