

Crusader Central Clinic JOB DESCRIPTION

Job Title: Planned Giving Specialist

Job Status: Exempt

Job Grade: 24

Manager Title: Vice President of Development

POSITION SUMMARY: The Planned Giving Specialist is part of the Crusader Community Health Foundation and reports to the Vice President of Development. The Planned Giving Specialist will lead the Planned Giving Committee of the Foundation Board in implementing all aspects of the strategic plan with regard to planned giving. The Planned Giving Specialist will work with the Vice President of Development, Crusader Management, Foundation Board and other key stakeholders to enhance and support the overall mission of the organization to ensure that prospering planned giving continues to enhance the future of the organization.

ESSENTIAL FUNCTIONS:

1. Accountable for demonstrating the qualities outlined in the “Customer Service Standards of Excellence and The Crusader Way” program when interacting with stakeholders including donors, patients, their families and friends, fellow employees and others.
2. Oversees and implements all aspects of planned giving and actively engages in and leads efforts to identify and secure major planned gifts and donors.
3. Under the direction of the Vice President of Development and with the assistance of the Chair and Planned Giving Committee, implements all aspects of the Foundation Strategic Plan with regard to planned giving.
4. Assists the Vice President of Development with implementing board approved planned giving policies, gift definitions, giving goals, methodologies, timelines and the corresponding materials to implement.
5. Manage the stewardship of planned donors once the gift is established to meet their needs and keep them informed about Crusader’s Mission and activities.
6. Analyzes the existing database for potential planned giving donors and seeks new potential donors by developing mail surveys and materials to capture interest.
7. Meets or exceeds defined benchmarks for planned revenue income, calls, events and marketing activities.
8. Identify, cultivate, and solicit prospective planned giving donors and keeps them informed about Crusader’s role in the community and its needs.
9. Strengthens the Planned Giving Committee and the Advisory Counsel by defining roles and responsibilities, recruiting new members and working with the Chair to prepare for regularly scheduled meetings.
10. Assists in the development of a Planned Giving Advisory Counsel comprised of selected agents of wealth.
11. Initiates program branding and creation of marketing materials to be used in all planned giving initiatives.
12. Initiates marketing strategies for planned giving including group presentations and educational materials.
13. Analyzes approaches to planned giving and develops an action plan to continue the process of identifying and securing giving commitments.
14. Other duties and assignments as directed by the Vice President of Development.

QUALIFICATIONS:

Knowledge of:

- All aspects of planned giving
- Relationship cultivation and ongoing donor stewardship in regards to planned giving

Ability to:

- Supports the mission goals and values of the organization
- Establish a Relationship Plan for each prospective donor
- Manage stewardship of committed planned donors
- Initiate program branding and coordinate the creation of the corresponding marketing materials to identify and reach out to potential donors
- Develop and maintain effective network relationships in the community
- Understand Crusader Community Health and effectively communicate relevant information to potential donors and community members
- Track planned giving, review data and report updates to identified groups
- Communicate effectively both written and verbally with strong presentation skills
- Assist as necessary with other development activities
- Ability to work on multiple projects throughout the day and prioritize deadlines, work independently with minimum/no supervision, manage time effectively, have a high attention to detail and follow through and appropriately set priorities.
- Develop systems to measure and track planned giving activities.
- Ability to comfortably interact with board members, co-workers, trust officers, estate planning attorneys and other partners
- Demonstrate a professional appearance with the ability to consistently portray a positive organizational image
- Maintain professionalism in stressful situations
- Travel as needed
- Write reports and routine business correspondence
- Maintain the confidentiality and records of donor data
- Demonstrate professionalism by approaching others in a tactful manner
- Treat others with respect and consideration regardless of their status or position
- Accept responsibility for own actions

EDUCATION/EXPERIENCE/TRAINING:

Education:

- Any combination of Education, Experience and Training that would provide the required knowledge and abilities is qualifying
- Bachelor's Degree preferred

Experience:

- Proven track record of three to five years of relationship based fundraising and/or relevant work experience
- Experience managing gifts of \$10,000 or more preferred
- Proven track record of securing donations preferred
- Previous development of area community relationships preferred
- Demonstrated ability to solicit and secure planned charitable gifts preferred

- Detailed knowledge of planned giving strategies and terminology preferred

Technical Knowledge:

- **Other Skills:** Strong computer literacy/proficiency in Microsoft Office
- **Equipment:** PC, email, facsimile machine, computerized voice mail system, and common office machines, multi-line telephone system
- **Software Knowledge:** Familiarity with one or more donor tracking database software systems. Familiarity with Blackbaud Razors Edge Software is a plus.

Physical Requirement Form

Job Title: Planned Giving Specialist

Physical Demands	Continuous over 70%	Frequent 40-60%	Occasional 15-39%	Rarely Up to 15%
Sitting		X		
Standing			X	
Walking			X	
Climbing				X
Bending				X
Pushing / Pulling				X
Carry / Lift			X	
1-15lbs				
15-30lbs				X
30-50lbs				X
Fine hand / Eye Coordination	X			
Exposure to Blood and Body Fluids				X
Exposure to Extreme Heat, Cold, Temp Fluctuations				X
Exposure to Hazardous Chemicals				X
Concentration on Detail	X			
Oral Communication	X			
Written Communication	X			

Crusader Community Health does not require nor does it expect that an employee lift over 50lbs unassisted. Objects in excess of 50lbs should be lifted or moved with mechanical means or a team lift.

Employee Name: _____ Date: _____

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed, as an exhaustive list of all responsibilities, duties and skills required of personnel so classified. They are representative to the knowledge, skills, and abilities 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.