

## **Carleton College Exempt Position Description**

**Job Title:** Director of Planned Giving (full-time) – Grade 14

**Reports To:** Senior Director of Major and Planned Giving

**Department:** Development

**Division:** External Relations

**Revision Date:** May 2021

### **Position Overview:**

The Director of Planned Giving is responsible for working with individual donors, providing support to other members of the Development staff, and managing, with oversight from the Senior Director of Major and Planned Giving, the marketing and management of Carleton's planned giving program. The person in this position will have two .50 FTE direct reports. The person in this position will be expected to work with our Legal Counsel, the Major Gifts team, and the Milestone Reunions group. There may be some cross divisional work with our Business Office.

### **Department Overview:**

The Major Gifts and Planned Giving staff travel regionally to work with alumni, parents, and friends of the College who are interested in supporting Carleton through outright and deferred charitable gifts.

### **Essential Job Functions/Responsibilities:**

- Cultivate and solicit current and prospective major and planned giving donors; including personal visits (requires some weekend work and travel of up to 25 percent).
- Serve as a consultant to other members of the Development staff that work with planned giving prospects, including strategizing, developing, and drafting written proposals using complex assets and a variety of planned gift instruments.
- Oversee the Joseph Lee Heywood Society, Carleton's recognition society for planned giving donors, including mailings and activities; manage the planned giving program marketing.
- In partnership with the Director of Milestone Reunions, provide the support required for alumni classes in the 50<sup>th</sup> reunion cycle facilitating and maximizing their gifts to the College.
- Supervise the Planned Gift Administrators.
- Develop and maintain technical expertise in legal and financial issues related to charitable gift planning; assure that all members of the major gifts team have basic planned giving training.
- Manage relationships with the College's planned giving partners, both internal and external, including: TIAA Kaspick, outside counsel, Carleton's Business Office and College Communications.

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties to meet the ongoing needs of the organization.

### **Education/Experience/Skills (supported by job duties):**

#### **Required Qualifications:**

- Baccalaureate degree and eight to ten years of directly relevant work experience in development, law, accounting, banking, or finance.
- Communication: Excellent writing and speaking skills,
- Current or recent experience with:
- planned gift instruments, supporting volunteers, individual donors, and committees.
- Demonstrable experience in working well both with individual donors, volunteers and in a professional team setting; flexibility and willingness to travel.

**In addition to meeting the above required qualifications, the following are highly desired:**

- Experience in educational and campaign fundraising is preferred.
- Demonstrated success in closing 7-figure gifts, outright and deferred.