

Director of Planned Giving (Advancement/Development) - Faith Based

Job Location: US-Philadelphia

About Kreischer-Miller

Kreischer Miller's Retained Executive Search Practice (RES) takes a highly personalized and collaborative approach to executive recruiting. We work directly with owners of privately-held and family-owned companies to help build their leadership teams. Our goal is to find the best fit for your organization – top-tier executives who will make an immediate and long-term positive impact on your company. Our RES Practice has a proven track record of locating talented senior-level executives. We are proud to be a perennial name on **Philadelphia Business Journal's list of Top 10 Retained Search Firms**.

About The Function

Summary

Our client, an independent, non-profit, community foundation serving Philadelphia since 2013, desires a Director of Planned Giving to hold primary responsibility for gifts of estates, trusts, and various other financial venues that reflect financial planning and deferred giving opportunities. The position will report directly to the Chief Philanthropy Officer and provide training and support for other staff in gift planning. The Director's responsibilities also include major gift solicitation.

The Director will identify, cultivate, and solicit individuals who are interested in making a planned gift through ongoing personal contact, with strong emphasis on in-person meetings and cultivation events. The Director will drive the growth and retention of donors and prospective donors as it relates to planned giving for our client, their fund holders and partners. The Director will work as part of a team of advancement professionals, providing guidance, support and contributing their expertise in gift planning to their colleagues as well as holding their own portfolio of major donors/prospects for cultivation and solicitation.

Job Responsibilities

- The Director holds primary responsibility for gifts of estates, trusts, and various other financial venues that reflect financial planning and deferred giving opportunities.
- This position will identify, cultivate, and solicit individuals who are interested in making a planned gift through ongoing personal contact, with strong emphasis on in-person meetings and cultivation events that result in commitments to deferred planned gifts, and assist other staff in their cultivation and solicitation efforts.
- Drive the growth and retention of donors and prospective donors as it relates to planned giving and other major gifts.
- Serve as a liaison and planned giving resource for parishes, schools, Archdiocesan offices, and other Catholic ministries.
- Support the overall long-term financial strength and support of the Foundation and its partners by executing the strategy for our client's Planned Giving program and achieving the Foundations fundraising goals.
- Visit with donors and prospective donors about gifting possibilities, particularly deferred and planned gifts.
- Work in partnership with other fundraising and development staff on existing donors and planned giving options.
- Attend and/or conduct Legacy Planning Seminars for prospective donor groups.

- Enhance donor relations by representing the organization at functions, seminars, and meetings and working with donors, potential donors, partners, and various constituencies of the organization to strengthen their ties to our client and the Church of Philadelphia.
- Assure donor confidentiality as well as the confidentiality of the projects undertaken by the organization by conducting all personal contacts and communications with donors in a professional manner.
- Adhere to regulations and policies governing donor privacy and data security.
- Track and monitor donor histories; conduct donor research; ensure appropriate outreach is designed and implemented; follow up with all prospective donors (personal visits, phone calls, letters) who have made or expressed interest in making a planned gift; ensure all donors are recognized for their contributions (correspondence, recognition events, invitations to special events); manage prospect lists and actions within the CRM system.
- Serve as resource to staff and donors on charitable giving issues and tax law; advise attorneys, financial advisors, and other professionals on gift policies.
- Develop progress reports and materials for presentation to the leadership team and Board of Trustees.
- Perform other duties as assigned.

Job Qualifications

- A deep commitment to the client's mission, and a passion for serving those in need.
- A strong understanding of the Roman Catholic faith.
- Bachelor's degree in related field.
- At least 5 years of successful planned giving experience is required; A demonstrated record of success in a related career field such as law, accounting, or financial planning is highly preferred.
- Proven track record identifying, cultivating, closing, and stewarding planned and non-cash gifts.
- Thorough knowledge of planned giving vehicles, non-cash gifts, and tax codes related to gift and estate planning.
- Proven skills in managing relationships with high-net worth individuals or funders.
- Experience in significant and/or successful fundraising campaigns.
- Advanced interpersonal and communication skills with proven ability to work closely and professionally with a wide range of constituents, including staff, board members, Member stations, external partners, and donors/prospects.
- An entrepreneurial spirit and strong appetite to work in a developing philanthropic environment with lots of potential.
- Exceptional verbal and written communication skills and excellent attention to detail.
- Proven ability to manage multiple projects, to set and adjust priorities, and work under pressure while maintaining composure and a pleasant demeanor.
- Previous experience with fundraising software (BBCRM, Raiser's Edge) highly preferred.
- This position requires occasional travel to attend evening and/or weekend activities, meetings, events, seminars, and workshops, etc.
- Moderate lifting – 20-50 pounds.
- Candidates must be legally eligible to work in the US without sponsorship.
- Only local (Philadelphia) candidates will be considered.

Qualified candidates should email their resume to bjones@kmco.com.

Bill Jones, Executive Recruiter, Kreischer Miller