



Affirmative Action/Equal Opportunity Employer

The American Friends Service Committee is a Quaker organization that promotes lasting peace with justice, as a practical expression of faith in action. Drawing on continuing spiritual insights and working with people of many backgrounds, we nurture the seeds of change and respect for human life that transform social relations and systems.

POSITION DESCRIPTION

TITLE: Planned Giving Manager

DEPARTMENT: Development

JOB CATEGORY: Exempt

STATUS: Full-Time

SUPERVISOR: Director of Planned Giving

REGION/UNIT: Central Office

LOCATION: Philadelphia, PA (three days per week in office and two days per week can be remote).

DATE APPROVED: June 2023

SUMMARY OF PRINCIPAL RESPONSIBILITIES

As part of the Planned Giving Unit, the Planned Giving Manager's primary responsibility is to oversee the efficient and accurate processing, administering, and stewarding of AFSC's planned gifts, including irrevocable life income gifts, revocable bequest intentions, and matured bequests. The Manager also oversees the coordination and production of planned giving marketing initiatives and participates in the overall marketing strategy. The Manager relates and interacts with planned giving donors, beneficiaries, and prospects, answering questions and resolving problems as needed.

ESSENTIAL FUNCTIONS/RESPONSIBILITIES: The key responsibilities of the Planned Giving Manager include the following:

1. Manage estate administration system for matured bequests and ensure that AFSC has appropriate documentation to properly administer each gift, in compliance with AFSC bequest administration procedures.
2. Follow up proactively with attorneys and executors to ensure bequest funds are received in a timely way. Advise and review complex matters with Director as needed.
3. Prepare monthly reports on bequest and matured planned gift revenue and keep Director informed of revenue trends.
4. Oversee planned giving phone line and email mailbox for donors and prospects. With limited supervision, respond appropriately to questions from planned

- giving donors, beneficiaries, and prospects related to their gifts or potential gifts. Forward gift prospects and questions to appropriate team members as needed.
5. Process planned gifts for the Unit in a timely and accurate way, preparing necessary agreements and documents for each gift using planned giving software. Ensure information is complete for each gift, following up with donors as necessary.
 6. Liaise with outside planned giving administrator for donor questions and updates and participate in standing meetings. Ensure administrator changes are implemented accurately.
 7. Oversee the coordination of planned giving marketing initiatives, including newsletters, emails, and social media, and assist with the overall marketing strategy.
 8. Review content for stewardship and marketing initiatives using unit's overarching messaging strategy and organization's program priorities.
 9. Assist with the unit's stewardship and cultivation efforts, including stewardship of Friends for the Future legacy society, annual stewardship letters, and gift acknowledgement letters.
 10. Maintain accurate donor records in the CRM system, including notes of cultivation and stewardship actions.
 11. Maintain and update Planned Giving Procedures Manual as needed. Make reports and recommendations for improvements or adjustments to procedures.
 12. Keep informed about the total program work of the AFSC through reading materials and participation in program updates.
 13. Support the unit with other duties as assigned.

MINIMUM QUALIFICATIONS

EDUCATION: Bachelor's Degree.

EXPERIENCE:

1. Three years' experience in nonprofit fundraising, with a preference for experience in planned giving or bequest administration.

OTHER REQUIRED SKILLS AND ABILITIES:

1. High attention to detail and accuracy in reviewing data and documents.
2. Pleasant telephone manner and excellent customer service skills. Patience and maturity in dealing with donors and staff, and their needs and requests.
3. Excellent computer skills including Windows environment and MS Office programs.
4. Knowledge and experience with database CRM systems, preferably Salesforce.
5. Ability to decipher information from various sources and follow detailed procedures. Ability to communicate technical matters in lay person's language.
6. Ability to organize schedules and workflows; to work under pressure to meet numerous deadlines; to give attention to detail and provide careful follow through on responsibilities.
7. Demonstrated ability to maintain confidentiality.
8. Excellent verbal and written communication skills.
9. Ability to work independently, take initiative, and use critical thinking on all tasks.
10. Ability to multitask and set priorities when there are competing demands.

11. Demonstrated ability to work cooperatively with others and in an organization which is characterized by a high level of consultation.
12. Dependability in meeting regular work hours. Ability to sustain heavier volume of work during emergencies, tax-time, special campaigns, and year-end contribution season.
13. Commitment to Quaker values and testimonies. Understanding of and compatibility with the principles and philosophy of the American Friends Service Committee including non-violence and the belief in the intrinsic worth of every individual.
14. Understanding of and commitment to the principles, concerns, and considerations, of AFSC in regards to issues of race, class, nationality, religion, age, gender and sexual orientation, and disabilities. Demonstrated ability to work and communicate with diverse staff.

COMPENSATION: *Salary Family - Development - Development Coordinator II*

Comprehensive medical and hospitalization plan; term life, accident and salary continuation insurances, defined benefit pension plan, plus fringe benefits; participation in unemployment and worker's compensation and social security.

The American Friends Service Committee is an Affirmative Action/Equal Opportunity Employer. Qualified persons are encouraged to apply regardless of their religious affiliation, race, age, sex, gender identity, sexual orientation or disability.

AFSC maintains a deep commitment to a mandate of care for our staff and communities, and thus requires vaccination and have at least one booster shot for COVID-19; as well as adherence to social distancing, masking, and office occupancy protocols.

AFSC's Central Office and some of its offices in the U.S. are unionized workplaces. This position is represented.

The American Friends Service Committee is a smoke-free workplace.
