

WARTBURG COLLEGE
POSITION DESCRIPTION

Title of Position: Scholarships and Gift Planning Coordinator

Preparation Date: March 2024

Function of Position:

Responsible for all facets to manage and award annually-funded and endowed scholarships, process and maintain Heritage Society records and expectancies including charitable gift annuities and other deferred-gift commitments, and provide support for Development staff. Works closely with Financial Aid and Senior Gift Planner regarding scholarship awarding and planned giving administration. Reports to the Associate Director-Institutional Advancement, Prospect Management & Research. Incumbent works with students, team members, college employees, donors, and/or guests of the college, treating all with respect.

Principal Duties and Responsibilities:

Scholarships (40%)

- Coordinate and execute an efficient, effective, and timely scholarship awarding process for annually-funded and endowed scholarships.
- Administer and manage awarded scholarships, coordinating the process between Development, Business Office, and Financial Aid.
- Maintain records and reports related to awarding of annually-funded and endowed scholarships.
- Manage scholarship donor/contact database, scholarship donor agreements, and other information related to stewardship of scholarship donors.
- Coordinate arrangements for annual scholarship luncheon, in collaboration with Advancement Associate-Donor Relations; prepare invitations, programs, speakers, meal planning, RSVPs, name tags, table tents, donor-recipient photographs, etc.

Heritage Society/Planned Giving (40%)

- Maintain Heritage Society membership records, prepare and process associated spreadsheets, files, lists, correspondence, forms, and birthday cards.
- Process charitable gift annuities, trusts, and other planned gifts; use Crescendo software to create proposals; prepare agreements, information sheets, correspondence, and files.
- Manage annuity checks from donors; maintain annuity spreadsheet information; prepare and monitor annuity payment schedules; process information for annuitants; assist with mailing 1099R forms.
- Process records and track activity related to bequests, expectancies, and other deferred-gift instruments; administer estate-settlement and maintain correspondence and records.
- Coordinate stewardship activities with Senior Gift Planner and Director of Stewardship & Special Gifts, including planning and execution of Heritage Society luncheon and other events related to planned giving donors; prepare invitations, programs, RSVPs, name tags, table tents, etc.
- Provide support for other Heritage Society and planned-giving mailings or marketing activities.

Development (20%)

- Process expense vouchers and credit card receipts for Senior Gift Planner, Major Gift Officers, and Vice President of Institutional Advancement.
- Administer general office support including letter generation, mailings, filing, scheduling meetings, ordering supplies, and answering phones.
- Perform other related duties as assigned.

Supervision:

In addition to working with supervisor, the employee works closely with Financial Aid, Senior Gift Planner, and Director of Stewardship & Special Gifts to develop strategies and pursue completion of established objectives, requiring the use of a wide range of procedures.

Minimum Qualifications:

Requires knowledge equivalent to an Associate's Degree plus two years of experience in fundraising/development or a related field required; proficiency with Microsoft Office (Word, Excel, Outlook, OneNote); strong writing, editing, and verbal communication skills; attention to detail and accuracy; aptitude for utilizing a comprehensive constituent database, online tools, and other software/technology resources; ability to collaborate in a team environment; capable of organizing and prioritizing multiple work assignments; ability to work limited evening and/or weekend work for special events or projects; ability to contribute to the cultivation of positive relationships on behalf of the college; ability to maintain confidentiality standards in safeguarding donor information/records; appreciation for the liberal arts college environment and mission of Wartburg.

Application Procedure:

Send letter of interest including a statement regarding qualities within the context of the Wartburg College mission, résumé, and contact information for three references electronically to: hr@wartburg.edu. See www.wartburg.edu for further information about the college. Screening begins immediately and continues until position is filled.

WARTBURG COLLEGE is a selective liberal arts college of the ELCA, nationally recognized for community engagement. As an affirmative action, equal opportunity institution, Wartburg College actively seeks applications from underrepresented groups.