

WARTBURG COLLEGE
POSITION DESCRIPTION

Title of Position- Senior Gift Planner

Preparation Date: May 2021

Function of Position:

The Senior Gift Planner is responsible for the successful design, implementation, and assessment of a comprehensive planned giving program in support of the College's mission. This position serves both as a mentor, as well as a service provider, to the major gift and annual giving staff in order to develop a greater understanding of planned-giving opportunities and success in securing such gift commitments. A broad working knowledge of development is important, and expertise in planned giving is essential. This position will devote roughly one-third of their time to managing a robust planned giving program, and two-thirds of their time to developing relationships with donors to realize outright- and deferred-gift commitments. This position reports to the Vice President for Institutional Advancement. A significant amount of travel, including some evenings and weekends, is expected in this full-time (12 month) position.

Responsibilities:

1. Engage, cultivate, solicit, and steward a portfolio of major- and/or planned-gift prospects. (40%)
2. In collaboration with the Director of Advancement Services, provide oversight to the process for identifying, cultivating, and soliciting planned giving prospects, as well as establishing overall program goals and assessing results. Provide ongoing education, training and support to major gift and annual giving staff in order to develop an enhanced understanding of planned-giving opportunities and success in securing such gift commitments. (25%)
3. Manage an effective marketing/educational program to create awareness and promote the benefits of planned gifts and estate planning to all ages of the constituency through regular and targeted communication and/or activities. (10%)
4. Provide leadership to the Fifty-Year Class Reunion Appeal and other select initiatives, emphasizing planned gift opportunities and effectively engaging volunteers in support of targeted goals. (10%)
5. Manage the administration of estate and other planned gift expectancies. Oversee the development and implementation of an effective stewardship program focused on the Heritage Society that promotes encourages philanthropy, to include regular reports of how endowed gifts and other gifts are used. Supervise the Office Coordinator for Major Gifts/Planned Gifts. (5%)
6. Develop and engage a network of allied professionals in advancing the planned giving program of the college. (5%)
7. Perform other duties as assigned.

Minimum Qualifications:

Requires Bachelor's degree, advanced degree or professional certification (i.e., JD, CFP, CFRE) preferred, gift planning experience as an attorney, financial planner or planned giving officer is preferred, three years of proven ability to cultivate and secure major planned and current gifts, effective relationship-building skills, knowledge of planned giving techniques and the ability to effectively communicate those techniques to others, and a commitment to the mission of Wartburg College.

Application Procedure:

Send letter of interest, including a statement regarding qualities you offer 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.

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 women and members of ethnic and minority groups.