



WABASH COLLEGE POSITION DESCRIPTION

| | | | |
|-------------------------------|---|-----------------|--------|
| Job title: | Major and Planned Gifts Officer | | |
| Division/department: | Advancement/Gift Planning | | |
| Reporting relationship: | Director of Gift Planning | | |
| Supervising responsibilities: | No direct reports | | |
| Location of job: | Kane House | | |
| Work schedule: | 8:00-4:30, Monday-Friday Travel and Evening/Weekend Hours Required | | |
| Exemption status: | Exempt | Payroll status: | Salary |

Summary of Duties and Responsibilities

The Major and Planned Gifts Officer is part of the Wabash College Advancement Office and is central to helping enhance the College's great tradition and culture of philanthropy. The Major and Planned Gifts Officer assists the Director of Gift Planning in a cohesive effort to maximize the department's strategic priorities. Reporting to the Director of Gift Planning, the Major and Planned Gifts Officer works with Advancement colleagues and volunteers to identify, cultivate, solicit, and steward major and planned gifts. Additionally, the Major and Planned Gifts Officer helps to provide support for marketing, educating, and creating greater awareness of planned giving options to the larger Wabash constituency.

Primary Duties and Responsibilities

1. Manage a portfolio of prospects and implement cultivation, solicitation, and stewardship strategies to move prospects to be leadership level annual, major, and planned gift donors to Wabash College.
 - a. Develop and maintain strong, long-term relationships with constituents.
 - b. Achieve prospect management activity metrics including annual goals for face-to-face visits completed, dollars raised, gifts closed, and new prospects identified.

Specifically:

 - i. Conduct a minimum of 75 face-to-face fundraising cultivation and solicitation meetings with alumni, parents, and friends of the College each year. Conduct additional stewardship related meetings with constituents each year. Travel will be within an assigned regional geographic territory.
 - ii. Complete and close fundraising solicitation proposals with a percentage of face-to-face visits each year.

- iii. Conduct an additional number of phone, virtual, and electronic cultivation and solicitation conversations with alumni, parents, and friends of the College.
 - iv. Utilize prospect research, social media, and other networks to identify potential new prospects for cultivation and solicitation.
 - c. Involve appropriate campus constituents and volunteers in the cultivation, solicitation, and stewardship process.
 - d. Complete well-thought, detailed fundraising plans and contact reports (visits and other contacts).
 - e. Implement appropriate personalized follow-up and stewardship plans.
- 2. Provide support for marketing, educating, and creating greater awareness of planned giving options to the larger Wabash constituency.
 - a. Meet with prospective donors and potentially their advisors. Analyze and prepare gift proposals, endowment agreements, gift benefit illustrations, gift transfer documents, bequest language, and other gift agreements to secure outright gifts and/or deferred gifts.
 - b. Provide follow-up with general inquiries from interested planned giving prospects including the creation of gift illustrations when necessary, accompanied by general gift planning materials as appropriate. Seeing that top prospects as flagged are brought to the attention of the Director of Gift Planning. Ensure planned gifts are appropriately received, recorded, managed, acknowledged, and stewarded consistent with College policies as well as maintaining support for needed reports and information gathering. Maintain and manage the file of known, open estates, and work to bring them to successful closure respective to the gift(s) allocated to Wabash.
 - c. Oversee the effort to properly steward new planned gifts and planned gifts donors by following the protocol outlined to recognize new members of Wabash's Kane Society (legacy society), and see that existing members with new gifts receive proper recognition.
 - d. Manage oversight of annual legacy society event planning.
 - e. Provide support to the Director of Gift Planning's effort to manage annual correspondence and dissemination of reports and other stewardship activities to life-income plan donors, including but not limited to college managed CRTs, CGAs, and PIFs.
 - f. Work with the Director of gift planning to prepare regular reports on gift planning activities and results, analysis of relevant trends, proposed or enacted legislation, etc. Collaborate with the Director of Gift Planning to support the Dean for College Advancement's needs for planned giving data and materials for use in trustee meetings and/or training opportunities.
 - g. Learn to proficiently utilize the Crescendo platform with specific emphasis on eNewsletter, eBlast, and illustration/proposal creation.
 - h. Provide support to the Director of Gift Planning for managing annual 50th Reunion Class Gift Campaigns,
 - i. Work with the Director of Gift planning to implement periodic survey instruments and other tools used for identifying/gauging potential planned giving prospects as

well as connecting with legacy society households which haven't been visited in recent years.

3. Maintain an understanding of the College's strategic and philanthropic priorities including academic, capital, financial, athletic, and student programs.
4. Attend campaign, prospect management, and Advancement Staff meetings as required and actively participate in those meetings.
5. Attend on- and off-campus events that allow for constituent engagement and cultivation. Examples include athletic contests, social events, campaign events, regional events, homecoming, and reunion weekend.
6. Complete reimbursement reports and other reports as assigned in a timely manner.
7. Work closely with Alumni & Parent Relations, the Annual Fund, Major Gifts, and Advancement Services, to create an effective College Advancement team.
8. Take advantage of regular and continuing training/professional development opportunities necessary to remain up to date in knowledge of planned giving issues and vehicles. Attend professional meetings that relate to advancement generally and planned giving specifically.
9. Fulfill other appropriate duties as assigned.

Evaluation

Evaluation of Advancement staff is an ongoing process. Interim goals and objectives will be set and monitored on a regular basis. Formal evaluation will occur in May of each year.