Position: Director of Gift Planning
Full Time, 12 Months

Reports To: Executive Director of Development

Job Summary:

The Director of Gift Planning will participate as a member of the gift officer team reporting to the Executive Director of Development. The Director of Gift Planning will manage a portfolio of between 150 and 200 qualified planned giving prospects – building relationships from prospect identification through meaningful and timely cultivation, solicitation and stewardship. The Director of Gift Planning will also be responsible for the development, promotion and implementation of the College’s gift planning program.

Responsibilities and Duties:

1. Identify, qualify, cultivate, and solicit planned gifts in support of Houghton College.
2. Manage a portfolio of 150-200 prospects; develop and document written cultivation and solicitation strategies and proposals, purposefully guide them to make major investments in Houghton College, and develop relationships to maximize their giving potential over time.
3. Meet explicit performance objectives including the completion of between 12 to 15 personal face-to-face visits with assigned suspects and prospects and a like number of other actions each month, such as phone calls, emails, letters, etc.
4. Coordinate cultivation activities and solicitations with other Houghton College representatives, including the president, vice president, other senior staff, advancement and alumni/church relations colleagues, key faculty, and volunteers as appropriate.
5. Work in conjunction with the Gift Accounting Manager to ensure appropriate illustrations and stewardship reports are prepared, activities conducted, and questions resolved for planned giving donors.
6. Provide timely, written reports regarding the outcome of cultivation and solicitation actions in the form of contact reports, stage updates, and strategy statement updates and revisions.
7. Participate in the prospect tracking and management process in alignment with established procedures and protocols through reporting on results, calendar plans, documentation of strategies, and participation in prospect-focused meetings.
8. Travel extensively and consistently in the fulfillment of these duties given the location of the college and the geographic diversity and distribution of its alumni, donors, prospects, and volunteers.
9. Conduct and manage periodic seminars for donors and prospects designed to provide information relative to planned gifts; supports the planning process and attends special events including but not limited to Alumni Relations and donor stewardship events.
10. Serves as the liaison for the College with estate planning professionals, including estate planning attorneys, financial planners, accountants, and other financial and legal advisors.
11. Perform other duties as assigned by the Executive Director of Development or Vice President for Advancement.
Requirements:

1. Houghton College Organization
   - Demonstrate knowledge of organizational mission and direction as a context for all outreach to external constituencies.
   - Demonstrate knowledge of structure, policies and procedures.
   - Actively participate in divisional and cross-divisional teams.

2. Customer/Client Base
   - Working understanding of external client/stakeholder base – including but not limited to donors, alumni, friends, faculty, staff, parents, etc.
   - Appreciation for stakeholder expectations, desires, and needs.
   - Ability to adapt cultivation, solicitation, recognition and stewardship programs for appropriate groups and key individuals.
   - Ability to position and close personal solicitations for the full-range of gift planning instruments including but not limited to annuities, trusts, will bequests, IRA rollovers, stocks, and more.

3. Fund-Raising Knowledge
   - Appreciation for the fund-raising cycle: identification, qualification, cultivation, solicitation, acknowledgement, recognition and stewardship.
   - Active involvement in development processes including donor/prospect tracking and management as documented on the Raiser’s Edge software system.
   - General understanding of the range of charitable giving vehicles including their benefits to the donor and to the college.

4. Volunteer and Internal Partner Development
   - Knowledge of volunteer and internal partner identification and recruitment techniques.

Educational/Experience Requirements:

1. Three to five years of experience, preferably in fund raising and gift planning, or in a field providing comparable knowledge of charitable tax law and financial and estate planning principles.

2. Bachelor’s degree or higher. Law degree or certification in financial planning or public accounting is desirable.

3. Strong communication skills: written, oral and listening.

4. Strong planning and organizational skills, including ability to manage multiple relationships to the point of and through solicitation.

5. A willingness to travel extensively on behalf of Houghton College.

6. Affinity with the overall mission of Houghton College.

7. Personal characteristics associated with successful development professionals, including a vigorous work ethic, sound judgment, impeccable integrity, demonstrated initiative, appropriate professional appearance, and attitude and personality to work effectively with colleagues, Houghton College faculty and staff members, volunteers, and constituents.

To apply please submit a cover letter, resume, three references, and statement of Christian commitment to:
Human Resources Department
Houghton College
Houghton, NY 14744
jobs@houghton.edu

(Application materials preferred via email)
Priority given to applications submitted by April 15