



**Job Title:** Major Gifts & Planned Giving Officer  
**Department:** Development & Marketing  
**Reports To:** Director of Development and Marketing  
**FLSA Status:** Exempt, Salaried

### **SUMMARY**

The Major Gifts & Planned Giving Officer oversees the identification, cultivation, solicitation and stewardship of major gift and planned giving prospects and donors. This manager also recruits, trains and utilizes a group of volunteers to assist in all aspects of the functions listed below.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

- Working closely with the Director of Development and Marketing, develop, manage and update a strategic program plan for Major Gifts and Planned Giving.
- Develop and manage an annual revenue and expense budget for the programs.
- Develop print and electronic marketing plan and materials for the major gifts, planned giving and recurring giving programs including articles and advertisements for League publications, website promotion and social media.
- Prepare weekly, monthly, and annual program performance reports.
- Develop and maintain an ongoing inventory of specific giving opportunities within the League operating budget, capital budget and special projects.
- Lead and manage organization's naming opportunities program.
- Manage a portfolio of major gift prospects; implement personalized strategies for each prospect.
- Manage the Leadership Circle program, the Peace of Mind program, the Forever Friends program and any additional other giving societies' programs as may become appropriate.
- Secure meaningful face-to-face visits with donors/prospects weekly.
- Work closely with League staff to prepare written proposals tailored to specific prospects.
- Provide support to League staff, board of directors and other volunteers involved in major gift and planned giving activities.
- Identify potential new sources of major support from individuals and foundations and develop strategies to cultivate and solicit these prospects.

- Work with leadership and the development team to identify granting opportunities and pursue grant funding to meet annual revenue goals and ensure timely grant reporting and appropriate grantor recognition.
- Oversee stewardship of current donors through program of personal contact, recognition, and communication, including acknowledgement letters and phone calls.
- Work closely with appropriate senior staff and Board members in developing recognition and cultivation events for major gift and planned giving donors.
- Maintain and continuously update knowledge of charitable estate planning.
- Develop and manage strategies and approaches for the estate and financial planning communities.
- Manage relationship with Community Foundation for Palm Beach and Martin Counties to promote gifts to the League endowment fund and charitable gift annuities.
- Extract and analyze data from donor database and other sources to help identify and qualify major gift prospects.
- Coordinate with key staff on all database protocols and procedures related to major giving and planned giving.
- Develop skills and capacity to fully utilize Raisers' Edge.
- Attend and contribute in meetings with management, Board, and operations staff to improve the organization's ability to meet its objectives through long and short term goals.
- Represent the League at public and private events
- Recruit, train and supervise the efforts of volunteers in support of the major/planned gifts program goals and operations.

## **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Demonstrated success in managing and forging relationships with donors
- Experience with developing and maintaining productive working relationships with donors and tangible experience of having expanded and cultivated existing donor relationships
- Must support the Animal Rescue League's mission, policies and practices
- Must be able to provide accurate information to the public at all times
- Must be able to deal tactfully and effectively with the public
- Must be willing to participate in meetings with management, Board, and shelter staff to share ideas and suggestions designed to improve the organization's ability to meet its objectives
- Must be available for some nights and weekends as related to special events and activities

- Must be able to supervise volunteers
- Demonstrated ability to communicate in written and verbal format
- Must have reliable transportation to events and meetings
- Must be well organized, flexible, a self-starter, and work well under pressure
- Computer proficient
- Possession of a valid Florida drivers' license and driving record acceptable to insurance carrier

## **COMPUTER SKILLS**

- Computer experience with data base management and publishing programs
- Microsoft Word and Excel

## **EDUCATION and/or EXPERIENCE**

- Bachelor's Degree with three to five years related experience and/or training; or equivalent combination of education and experience

## **MATERIALS and EQUIPMENT USED**

- Computer
- Telephone system

## **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions:

- While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit. The employee will also be required to use hands and fingers as well as bend neck and twist.

## **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions:

- While performing the duties of this job, the employee is frequently exposed to an indoor office environment climate condition. The employee is occasionally exposed to animal odors and animal fur.
- The noise level in the work environment is usually moderate.

By my signature, I hereby certify that I have reviewed the attached description of my position and agree to perform the duties described therein. I understand that the organization may make modifications, additions, or deletions to this job description at any time, and will notify me of any changes by sending me a revised copy for my review and signature.

Employee Printed Name \_\_\_\_\_

Date: \_\_\_\_\_

Employee Signature \_\_\_\_\_