

FRIENDS GENERAL CONFERENCE JOB DESCRIPTION

May 2009

Job Title: Planned Giving Coordinator

General Statement:

The Planned Giving Coordinator works closely with the Associate Secretary for Development and Interpretation and the full FGC Development team to develop and implement a comprehensive planned giving program for FGC. We want the program to be “donor-directed,” i.e., to serve our supporters by helping them to discern how they can use planned giving vehicles to meet their own needs while supporting the causes and organizations they believe in.

The Planned Giving Coordinator for Friends General Conference meets, build relationships with, serves and solicits planned giving prospects and donors. The position does not require a detailed knowledge of planned giving. FGC works with outside consultants on the more complex estate planning matters as needed for our donors. The position does require visiting donors approximately half of one’s work time, plus an availability to work some weekends and evenings. Most of the travel will be in the greater Philadelphia area and the northeastern United States.

Desired Qualifications

Education:

1. College degree or equivalent.
2. A basic understanding of planned giving, and an ability to learn more.

Experience:

1. Prefer an active member of the Religious Society of Friends, or familiarity with Quakers, and a strong concern for Quaker life and the life of the Spirit.
2. Doing development work for a nonprofit organization, including the identification, cultivation, and solicitation of donors.
3. Working with volunteer committees and fundraising staff.
4. Using database programs for development work.
5. Writing educational and promotional materials.
6. Experience with a range of Quaker meetings and organizations.

Skills:

1. Building good relationships with current and potential donors.
2. Soliciting contributions or deferred gifts.
3. Developing prospect leads and pursuing gift plans for prospective donors.
4. Ability to write and speak clearly and effectively.
5. Researching, organizing, and interpreting development data.
6. Taking initiative, providing leadership, and working cooperatively with others.
7. Conceptualizing, articulating, and implementing projects.
8. Ability to work on many different projects, while setting priorities and meeting deadlines.
7. Proven ability to problem-solve imaginatively and creatively.
8. Ability to move easily between planned giving and major gift conversations.

(continued on reverse)

DUTIES AND RESPONSIBILITIES

1. Become knowledgeable about planned giving and the variety of charitable giving vehicles that are available to donors.
2. Travel extensively to visit FGC donors and prospects. Make 125-150 personal visits each year (10-15 prospect visits monthly). This will involve traveling approximately one-half of one's work time.
3. Build relationships with current and potential planned giving donors through visits, calls, letters, and other donor engagement activities.
4. Solicit planned gifts and other contributions from these potential and actual donors.
5. Discuss estate planning vehicles and strategies with prospects and support them in finding their own individual ways to be more creative and effective with their estate planning and their desire to nurture the vitality of Quakerism.
6. Develop and implement a comprehensive marketing strategy for planned giving.
7. Identify a continuing stream of planned giving prospects through database analysis, mailings, websites, planned giving workshops, and conversations with knowledgeable Friends.
8. Work closely with legal and financial professionals as necessary to design and execute more complex planned giving instruments.
9. Work closely with the Associate Secretary for Development and Interpretation to report on work and describe successes, as well as to refer some prospects for major gift solicitation.
10. Personally acknowledge all gifts from assigned donors in writing and with personal contact via the telephone or in-person.
11. Maintain information in DonorPerfect and individual donor files, including notes on cultivation and solicitation and donor's personal information of relevance to FGC.
12. Attend planned giving courses, seminars, and other events for professional development in planned giving.

Other

1. Attend Central Committee meetings, and some meetings of the Development, Finance, and Executive Committee, as requested by the Associate Secretary for Development and Interpretation.
2. Attend and work at the FGC Annual Gathering of Friends each year, plus one or two yearly meeting sessions and occasional other Quaker events.
3. Stay informed about FGC programs and services, and maintain good relationships with staff.
4. Other duties as assigned by the Associate Secretary for Development and Interpretation.

Supervisor: Associate Secretary for Development and Interpretation

Hours: Full time (Exempt)

Starting Salary: Approximately \$40,000 to \$50,000, depending on experience, plus generous benefits.