

POSITION VACANCY

POSITION: PLANNED GIVING OFFICER
DEPARTMENT: INSTITUTIONAL ADVANCEMENT
CLASSIFICATION: EXEMPT
POSITION REPORTS TO: ASSOCIATE VICE PRESIDENT FOR INSTITUTIONAL
ADVANCEMENT

ABOUT KING'S COLLEGE

King's is a Catholic, comprehensive, coed, college in the liberal arts tradition founded in 1946 by the Congregation of Holy Cross from the University of Notre Dame.

Located in downtown Wilkes-Barre, Pennsylvania, this community of approximately 2,800 students prides itself on professional preparation, personalized attention, and a caring community. The minute you step on campus, you will experience the warm, friendly vibe. Founded to educate the sons of coal miners, King's continues to serve the sons and daughters of the working class with approximately 40% of our undergraduate students who will be the first in their family to graduate from college.

Mission Statement: King's College is a Catholic institution of higher education animated and guided by the Congregation of Holy Cross. King's pursues excellence in teaching, learning, and scholarship through a rigorous core curriculum, major programs across the liberal arts and sciences, nationally-accredited professional programs at the undergraduate and graduate levels, and personal attention to student formation in a nurturing community.

Vision Statement: Since its founding in 1946, King's has been dedicated to the Holy Cross ideal of transforming minds and hearts with zeal in communities of hope. The College's commitment to students is expressed both in the curriculum and in co-curricular programs encouraging service, fostering reflection, and cultivating leadership skills. Inspired by the teaching and example of its namesake, Christ the King, who taught by example and ruled by love, King's forms graduates who will champion the inherent dignity of every person and will mobilize their talents and professional skills to serve the common good. In the words of its founding president, "King's teaches its students not only how to make a living, but how to live."

INSTITUTIONAL ADVANCEMENT OPPORTUNITY

King's is at an exciting moment in its history. The College is in a place of fiscal stability, strategic growth, and incredible opportunity as we prepare for our next comprehensive campaign. The successful candidate will join a growing team of energetic and enthusiastic professionals committed to the King's mission, and mindful that the better our team performs, the greater the impact on our students' opportunities and experiences. Identifying the right candidate to assume this important leadership position is a key priority.

As King's enters its most ambitious comprehensive campaign, we are looking to professionalize our planned giving efforts. Toward that end, King's seeks an experienced professional to lead the Planned Giving Program ("PGP").

- The PGP includes direct marketing (phone, mail, electronic, emerging technologies) and personal solicitation. Its goals include the development and implementation of comprehensive and collaborative strategies, overseeing the identification, cultivation, solicitation, and stewardship of planned giving donors, and ensuring that King's develops a successful pipeline of planned gift prospects.
- The PGP solicits for planned gifts from all of King's individual constituencies - alumni, parents, faculty, retirees, staff, students, and friends.
- The Planned Giving Officer ("PGO") will report to the Associate Vice President for Institutional Advancement, Sr. Director of Development & Campaign ("AVP"), and will be a member of the Advancement leadership team. In the interim, the PGO will report to the Vice President for IA.

JOB FUNCTIONS

The PGP is a priority for King's and requires a motivated self-starter who will enjoy working in a fast-paced environment while building mutually-supportive relationships with alumni, staff, faculty, and volunteers. The position requires an individual who values and exhibits teamwork, perseverance, optimism, and who has an ability to think strategically and creatively. The position also requires extensive data analysis and data-driven decision-making.

ESSENTIAL ELEMENTS

The PGO will:

- Be a visible leader for planned giving at King's.
- Understand, and have the ability to communicate and educate others about the wide variety of planned giving/estate planning tools available to benefactors.
- Develop a comprehensive planned giving strategy and calendar for all phases of King's planned giving, including mail, phone, email, social media, in-person meetings, seminars and other appropriate channels. This strategy will include:
 - o Partnerships with appropriate King's departments and professionals, such as the Alumni Relations team, Marketing & Communications team, academic, athletics and other campus leaders, development officers, and directors.

- Long-term strategies for building a case for support through various college communications opportunities.
 - Short-term strategies for implementing planned giving best practices.
- Manage a portfolio of alumni, parents, faculty, staff, friends, and others who have capacity to make planned gift commitments.
- Develop and execute on strategies to identify, qualify, cultivate, solicit, and steward planned giving donors.
- Complete moves management reports in a timely manner to ensure that data is accurate and beneficial to future use.
- Be the program's creative leader, using research, data and best-practices to develop themes, appeals, campaigns, methods, and stewardship activities.
- Conduct on-going research to identify and implement the appropriate approach to marketing the PGP and other giving opportunities.
- Market the 1946 Legacy Society (the stewardship society for planned giving benefactors) to all college constituents aged 55 and older.
- Manage Crescendo marketing service to actively promote planned giving opportunities via web, e-newsletters, and direct mail.
- Establish a planned giving council of philanthropic advisors in the legal, insurance, accounting, tax and wealth management fields.
- Provide strategic reports and recommendations to superiors, including the AVPIA, the VPIA, and other division and College leadership.
- Use the College database (or any future updated database system) to retrieve data. Perform comprehensive analysis and manipulation related to all aspects of the PGP.
- Develop and maintain a working knowledge of King's in general and funding priorities so as to articulate a compelling case for support to all constituents.
- Evaluate program success by mining the development database and analyzing appeal results. Perform comprehensive analysis related to all aspects of the PGP. Use data to evaluate current programs and to make recommendations for program changes.
- Maintain strong knowledge of leading industry practices.
- Keep abreast of current trends in planned giving and development.
- Manage the PGP budget, including:
 - Working in partnership with the AVPIA to oversee, plan, and implement departmental budget.
 - Engaging the PGP team in budget process to promote understanding and career development.
 - Stewarding King's resources in the most effective and efficient manner possible.
- If the PGP program grows, potential opportunity to manage the PGP team, including:
 - Manage, supervise, motivate, evaluate, and mentor direct reports.
 - Provide regular feedback on performance to direct reports. Develop an agreed upon set of measureable metrics of performance.
 - Create plan for mentoring staff development via internal and external resources.
- Align the departmental goals with the Advancement and College priorities.

- Ensure open communication with Major Gift Officers, the Annual Giving team, and the Director of Advancement Research regarding contact of potential donors.
- Responsible for evaluating the PGP and reporting program's progress to Advancement and College leadership, as well as the King's Board of Directors (when appropriate).

QUALIFICATIONS

1. Bachelor's degree.
2. Graduate degree in business, finance, or related field and/or JD preferred due to the complexity of planned giving field and related laws.
3. Experience with planned giving/estate planning field.
4. Experience with direct marketing techniques and statistical analysis.
5. Ability to organize and lead a multifaceted program.
6. Success as an innovator and creative problem solver.
7. Committed and proficient learner.
8. Excellent written communications and public speaking skills.
9. Excellent interpersonal skills, including relationship management.
10. Experience with analyzing data and making data-driven decisions.
11. Experience as a supervisor with strong organizational and training skills.
12. Experience in personal gift solicitation.

Other preferred qualifications include:

1. Exhibits highest ethical standards.
2. Reflects an optimistic and a positive attitude.
3. Excellent management, organizational, and leadership skills.
4. Ability to work independently and satisfy defined metrics for success.
5. Ability to work with volunteers, including stakeholders like the Board of Directors, the President's Council, and similar entities.
6. Ability to work effectively with individuals of diverse backgrounds, personalities, and life experiences.
7. Ability to build effective relationships with colleagues across an organization.
8. Willingness and ability to work weekends and evenings as required.
9. Some travel required.
10. Possess a valid driver's license.
11. High energy.
12. Sense of humor.
13. Team player.
14. Hunger to be successful.

LOCATION

- Required to commit to being on campus during on boarding sessions within first 30 days of employment and then at minimum 1-2 days a week on-going.
- Flexible location based on portfolio.

INTERESTED CANDIDATES SHOULD SUBMIT: (1) A RESUME; AND (2) COVER LETTER OF INTEREST BY EMAIL TO hriobs@kings.edu.