

WESTMONT COLLEGE

Senior Director of Gift Planning **Office of College Advancement**

Position Summary: Provide leadership for all aspects of Gift Planning which is focused on building the long-term philanthropic support for the college and its Endowment. Responsible for overall execution and management of the office's deferred giving fundraising with donors and prospects, building the legacy society, overseeing the marketing and communications programs, and maintaining a robust donor stewardship program.

Qualifications:

Requirements include: minimum of 5-10 years of planned giving experience, preferably in higher education; Bachelor's degree required, master's preferred; personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations, and a clear understanding of, and the ability to articulate, the distinctives of a Christian liberal arts education: excellent oral and written communication skills; proven leadership skills managing others; proven success in moves management, and in cultivating and securing planned gifts: expertise with planned giving strategies and general estate planning. Additional requirements include: experience working in a campaign environment: computer proficiency, familiarity with Salesforce platform highly desirable: self-motivated, creative, organization skills and ability to effectively present a persuasive case for support of the College

Responsibilities:

- In conjunction with the Vice President, develop the office's key metrics and manage both annual and multi-year campaign goals.
- Provide administrative oversight of the office, including: staff recruitment, hiring and supervision; budget; production of reports for the President, Vice President and Board of Trustees; events; and the marketing and communications programs currently managed by the director of gift planning.
- Serve on the Senior Leadership team in the Office for College Advancement.
- Manage a portfolio of Gift Planning prospects and donors to secure bequests and other planned gifts, including charitable gift annuities, charitable remainder trusts, and blended gifts, and provide guidance to the gift planning staff in the management of their portfolio and other responsibilities.
- Oversee all aspects of the college's legacy society, the Wallace Emerson Society (WES). This includes ongoing stewardship of all WES members through regular meetings and annual college events such as the WES Luncheon at Homecoming and the Annual Christmas Festival.
- Host annual luncheon for 50-year graduating class (Golden Warriors) at commencement.
- Collaborate with the Major Gift Officers on securing blended gifts and other planned gifts and provide planned giving guidance as needed in their work with donors in their portfolios.
- Collaborate with Director of Research and Prospect Management to further build the pipeline of high-quality gift planning prospects.
- Stay current on charitable gift and estate planning strategies; cultivate and maintain relationships with estate planning attorneys and financial advisors.
- Serve as a resource to employees, faculty, staff, students, trustees, parents, guests and community contacts; work effectively with others by sharing ideas in constructive and positive ways; listen to and objectively considers ideas/suggestions from others; keep commitments; keep others informed of work progress, timetables and issues; address problems/issues constructively to find mutually acceptable and practical solutions; address

others by name in a respectful manner; respects the diversity of the work force in actions, words and deeds.

- Perform other duties as assigned.

Reports to: Vice President for College Advancement

11.19