

**NIAGARA UNIVERSITY**

**JOB DESCRIPTION**

**NAMES:** Vacant  
**DATE:** January 2023  
**JOB TITLE:** Planned Giving Officer  
**FLSA STATUS:** EXEMPT  
**JOB CLASS:** PROFESSIONAL  
**JOB STATUS:** REGULAR FULL-TIME  
**WORK LOCATION:** GACIOCH CENTER  
**TITLE OF IMMEDIATE SUPERVISOR:** AVP FOR INSTITUTIONAL ADVANCEMENT  
**DEPARTMENT:** ADVANCEMENT  
**SECTOR:** INSTITUTIONAL ADVANCEMENT

**Job Summary:**

Niagara University is seeking a Planned Giving Officer to effectively develop and maintain relationships with key major and planned gift constituencies. This position will report to the Associate Vice President in oversight of the Planned Giving Program. The successful candidate will work with the Associate Vice President for Institutional Advancement, academic leaders, volunteers, and other development staff to identify, cultivate and solicit current and new planned giving prospects; and integrate stewardship for persons holding current planned giving agreements with the University's stewardship plan. The Planned Giving Officer will provide information to and execute planned giving agreements for individuals who have expressed interest in supporting Niagara University through the Marcus Brown planned giving program.

The Planned Giving Officer is responsible for the cultivation and solicitation of a portfolio of roughly 125 prospects. The Officer assists with the implementation of a comprehensive program to educate alumni and friends of the university about the charitable giving opportunities available through bequests and other deferred giving options. The Planned Giving Officer will assist by increasing the number of deferred gifts in the university's planned gift prospect pool and growing the number of members of the Marcus Brown Heritage Society, NU's planned giving recognition society.

**ESSENTIAL DUTIES:**

- Design and implement an annual fundraising plan based on university objectives, working in conjunction with the Associate Vice President for IA.
- Guide donors in creating estate gifts that support the donor's philanthropic intentions while supporting the university's vision, the strategic plan, ensuring the highest level of stewardship once these commitments are made.
- Working knowledge of planned giving options including charitable gift annuities, charitable remainder and lead trusts, testamentary trusts, bequests, life insurance policies, retirement plan distributions and retained life estates.

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- Develop written proposals, illustrations, gift agreements, renewal letters, and other donor communications using Planned Giving software.
- Develop strategies and execute marketing plans to promote planned gifts among Niagara University constituents through mail, surveys, web, e-mail, and print media.
- Participate and lead events for prospective and current planned gift donors; including planning, execution, and speaking roles, as required.
- Document donor contacts in the donor management / CRM system following established protocols.
- Design and implement recognition and stewardship for donors of planned giving contracts, (i.e. newsletters, visits, recognition activities, seminars).
- Participate in assessing progress toward goals and prepare monthly progress reports to the Associate Vice President for Institutional Advancement.
- Participate in the development of policies and procedures relating to the planned giving program.
- Up-to-date awareness of planned giving vehicles and will seek training necessary to remain up to date in the knowledge of planned giving issues.
- Knowledgeable of estate planning and federal and state tax law as applied to charitable giving.
- Accountable for meeting or exceeding key performance metrics including visits and proposals, as determined by department leadership.
- Responsible for training and educating peers and university staff on the key principles of planned giving best practices
- Perform other duties as assigned.
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### **GENERAL DESCRIPTION:** % of Time

- 50%: Develop cultivation and solicitation plans, planned giving proposals and documents; work with faculty, staff and volunteers to implement and execute those plans.
- 30%: Engages in the identification, cultivation, solicitation and stewardship of currently- assigned major gift prospects.
- 10%: Create, coordinate & execute planned giving communication plan
- 10%: Produce appropriate documentation regarding prospect/donor contacts and planned gifts

### **REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:**

- Bachelor's degree, Master's degree preferred
- Five or more years (10 years preferred) of experience in prospect management, donor cultivation, and solicitation (or comparable experience in estate, tax or financial planning or wealth management.
- Willingness and ability to work flexible hours and travel, including evenings and

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weekends.

- Strong interpersonal skills, including the ability to relate to diverse constituencies, and deal effectively and discreetly with donors, colleagues, and allied professionals.
- Experience in Crescendo, PG Calc, or related planned gift illustration software.
- Ability to work independently as well as collaboratively in a team environment.
- Ability to manage multiple tasks and meet deadlines.
- Must be articulate, high-energy and goal-oriented.
- Strong organizational skills and attention to detail with the ability to utilize technological resources to maximum advantage.
- Excellent oral and written communication skills.
- A valid New York State driver's license is required that satisfies both University and insurance company underwriting rules and regulations for driving a motor vehicle. Must also be able to operate a motor vehicle in Canada

**THE UNIVERSITY RESERVES THE RIGHT TO MODIFY, REASSIGN OR COMBINE POSITIONS AT ANY TIME WITHOUT PRIOR NOTICE.**

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Employee Signature

Date

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Supervisor

Date

Jan 2023