



# SOUTHWESTERN UNIVERSITY

## Senior Director/Director of Development, Planned Giving

---

**Southwestern University**, located in Georgetown has an immediate opening for a Director of Development, Planned Giving. This position is responsible for retaining and expanding the University's base of major gift donors and prospects, identifying prospective donors, cultivating relationships, soliciting and closing major gifts, and providing appropriate stewardship, all in collaboration with the leadership of University Relations and Development. The incumbent's key responsibilities involve marketing, soliciting, closing, and stewarding planned gifts, alongside providing support to senior leadership with complex asset donations when necessary. This is a full-time, [fully benefited](#), exempt position who reports to the Associate Vice President for Development.

### Primary Duties:

- Identifies, cultivates, solicits, and stewards a portfolio of major gift prospects and donors.
- Solicits major gifts annually from all qualified prospects in this position's portfolio, including gifts to the Annual Fund.
- Engages in ~12-15 contacts monthly with major gift prospects/donors.
- Collaborates with AVP and VP to regularly add new prospects to this position's portfolio.
- Monitors and ensures achievement of annual performance measure goals for contacts, solicitations, and closures.
- Manages and achieves annual fundraising goals for unrestricted funds, current restricted funds, endowment, and capital/plant assigned to the portfolio each year.
- Utilizes a fundraising database and prospect tools. Maintains appropriate electronic documentation on a timely basis, including contact reports.
- Manages the Planned Giving department budget.
- Manages estate administration system, including bequests in probate, to produce correct, timely, and complete distributions to the University.
- Records timely reports, letters, proposals or gift agreements following a donor contact.
- Records and track all planned gifts on the University database.
- Ensures the development and execution of a comprehensive marketing and communications plan for the gift planning program to include e-newsletters, maintenance of the gift planning website,

advertising in University publications, arranging and delivering educational seminars for a wide range of constituents of the University, and outreach to professional advisors.

- Manages the ongoing recognition and stewardship of major and planned giving donors, including the 1840 Society.
- Serves as staff liaison to professional planned giving, legal, and financial advisors.
- Maintains University gift acceptance policies.
- Provides gift vehicle technical advice in written and oral form directly to prospects, their legal and/or financial advisors, and members of the development office staff.
- Participates in goal setting, proposal preparation, strategy development, and stewardship as required for donors in the portfolio.
- Effectively work with, communicate with, and collaborate with faculty, academic leaders, and other development staff to develop and secure campus-wide funding.
- Stays abreast of planned giving trends, opportunities, and related legislation, and provide regular updates to colleagues.
- Works with estate attorneys, executors, and internal departments to facilitate proper receipt and allocation of estate of deferred gifts.
- Assists as needed in drafting endowed fund and pledge agreements for testamentary gifts.
- Prepares planned gift illustrations for development colleagues to share with potential donors.
- Facilitates the issuance of charitable gift annuities.
- Establishes goals, objectives, and strategies for the planned giving program with the executive management team.
- Participates in assessing progress toward goals and prepare progress reports for the associate vice president and vice president of university relations.
- Supports and participates in University events.
- Coordinates Committee for Gift Acquisitions.
- Provides staff members with advice and counsel on matters related to planned gifts.
- Participates in regular development office and campaigns staff meetings.
- Serves on University and ad hoc committees as needed.
- Perform other duties as assigned.

### **Position Requirements:**

- Bachelor's Degree.
- Minimum of two (2) years (Director) of proven track record securing meaningful and major philanthropic gifts or equivalent experience.
- Strong leadership and time management skills with the ability to effectively and simultaneously manage many diverse relationships.

- Ability to control and move forward on several priorities simultaneously, without losing focus on the objectives of the University. This includes switching priorities as required, without losing momentum.
- Excellent communication skills, both oral and written.
- Strategic thinker coupled with a solid understanding of what constitutes well-written development documents.
- Ability to function as a catalyst, guide, and doer. Must be able to engage current and prospective donors utilizing a collaborative and facilitative approach.
- Possess a high level of professionalism, and the ability to perform under pressure.
- Integrity and the ability to build trust.
- Ability to travel regularly, both local and overnight, required.
- Strong resilience and ability to maintain a positive, solution-oriented attitude.
- Ability to work with others as a member of a team.
- Ability to respect confidential information.
- Demonstrated leadership skills, including a strong work ethic.
- Willingness to adhere to the University's core values.
- Knowledge, understanding, and acceptance of cultural differences and the diversity within the campus and community.
- Ability to interact in a professional manner with all internal and external University constituents.
- Understanding and commitment to a liberal arts education, including the ability to relate to a liberal arts faculty.
- Ability to attend work consistently and maintain a regular work schedule.

**Position Preferred Requirements:**

- Master's Degree (Senior Director)
- Seven years (Senior Director) of proven track record securing meaningful and major philanthropic gifts or equivalent experience.

**Southwestern University offers competitive salary and benefits** including health, dental, life, long term disability, retirement, paid holidays, vacation, sick leave, under graduate tuition assistance for yourself and your dependents, access to athletic facilities, free parking and discounted meal rates. Southwestern University is a selective, undergraduate institution committed to a broad-based liberal arts, sciences, and fine arts education. Southwestern University is deeply committed to fostering a diverse educational environment and especially encourages applications from members of groups traditionally under-represented in academia. For information concerning the University, visit our Web site at [www.southwestern.edu](http://www.southwestern.edu).

**To apply:** The University will only accept application materials through Interfolio at [apply.interfolio.com/158709](https://apply.interfolio.com/158709). Interested persons must submit a letter of interest, resume, the name and contact information of three professional references. Email and paper applications will not be accepted. Only completed applications will be reviewed by the Search Committee. The Committee will review all completed applications until the position is filled. All offers of employment are contingent on successful completion of the University's Background Check Policy process. Southwestern University is an E-Verify employer. [EOE/M/F](#)

**Salary: \$85,000 – 105,000 Depending on Experience**

*Inclusion is the deliberate effort to create an environment in which people from all backgrounds\* are not only included but welcomed, valued, respected, considered, and supported within our community. People from marginalized (i.e., devalued) and/or minoritized (i.e., underrepresented) groups are heard, seen, respected and accepted in all aspects of our community. Southwestern University is committed to inclusive excellence that provides access and support, enables participation, and removes barriers so that all people within our community are empowered and can thrive in a campus that is welcoming and validating.*

*\*including but not limited to people of color (race, ethnicity, nationality), sex, sexual identity, gender identity, age, physical and mental disabilities, socioeconomic status, religion, immigrants, and the intersection of these identities.*

**Jeanne Clery Statement:** *Notice of Availability of Annual Security and Fire Safety Report—Southwestern University Annual Safety and Fire Report is available online at <https://www.southwestern.edu/life-at-southwestern/safety-security/annual-security-reports/> containing mandated information about current campus policies concerning safety and security issues, required statistics, and other related information for the past three calendar years. To obtain a paper copy of the report, please call 512-863-1435.*