



DATE ISSUED: 11/10

FLSA: Exempt

PTO: VCS

JOB DESCRIPTION

TITLE

Development Officer- Major Gifts/Planned Giving

JOB SUMMARY

The position is responsible for identifying, cultivating, and soliciting prospects and current donors for the purpose of negotiating and closing various planned giving arrangements, major outright gifts, and endowments. Responsibilities include working with donors, their advisors, other outside allied professionals, University staff and faculty, and the TWU Foundation on the structuring, benefits, and implications of various planned giving arrangements, major outright gifts, and endowments. The position serves as the coordinator of the Old Main Society, the gift recognition society for deferred giving donors. Work is performed independently and requires the employee to be able to schedule, supervise, and set priorities. Evaluation is based upon successful completion of assignments and established goals. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Director of Institutional Development

Supervises: May supervise staff and/or student assistants as necessary and/or appropriate.

PRIMARY DUTIES - May include, but not limited to the following:

Identifies, cultivates, and solicits prospects and current donors for the purpose of negotiating and closing various planned giving arrangements, major outright gifts, and endowments.
Plans, implements, and evaluates TWU and TWU Foundation's planned giving program.
Writes all planned giving arrangement, major outright gift, and endowments proposals.
Develops planned giving, major outright gift, and endowment marketing materials.
Interacts with members of the academic community, mature major gifts prospects/donors and members of the legal, accounting and financial planning communities.
Keeps abreast of current tax laws and planned giving trends.
Coordinates operations of the TWU Foundation with the Development Assistant, Planned Giving/Endowments & Liason for the TWU Foundation.
Manages planned giving, major outright gift, and endowment content on website.
Records action steps in Raiser's Edge.

ADDITIONAL DUTIES

Performs other duties as requested.

EDUCATION

Bachelor's degree required. Master's preferred.

EXPERIENCE

Minimum of five years experience in the areas of planned giving, estate planning, trusts or fundraising.

REQUIREMENTS

Must have a valid Texas driver's license with good driving record.

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position.

KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:

Knowledge of current trends and fund raising practices, methods, resources and regulations related to the position.

Knowledge of computer technology and software programs and their application to information management.

Working knowledge of office practices and methods.

Ability to establish and maintain effective work relationships with other employees and the public.

Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.

Ability to apply budgeting and fiscal planning techniques within financial constraints.

Ability to communicate effectively - orally, by phone, in person, and in writing.

Ability to travel to events on business-related matters.

Ability to file and perform data entry.

Ability to use a personal computer and other office equipment.

Working knowledge of Blackbaud Raiser's Edge database system.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; talk or hear. The employee must have the ability to occasionally lift and/or move up to 25 pounds. Specific vision abilities required by the job include ability to distinguish the nature of objects by using the eye.

WORK ENVIRONMENT

Employees are responsible for performing their duties in an environment that is free from discrimination, intimidation, coercion or harassment, including sexual harassment. Work is performed primarily indoors in an office setting. The noise level in the work environment is low to moderate. While performing the duties of this position, the employee may be required to travel.

SAFETY

Assists in the creation of a culture of safety and environmental protection by performing work safely in accordance with departmental safety procedures. Operates equipment safely and reports any unsafe work conditions or practice to supervisor.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____ **Date:** _____

Texas Woman’s University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman’s University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, sex, sexual orientation, or ethnic origin, age, veteran’s status, or against qualified disabled persons.

All positions at Texas Woman’s University are deemed security sensitive requiring background checks.