DIRECTOR OF PLANNED & LEADERSHIP GIVING

Job Description

REPORTS TO: Chief Advancement Officer **STATUS:** Exempt, Full Time

SCHEDULE: 12 Months, Full time, 40 hours per week. Normal business hours are M-F, 8 a.m.-4:30 p.m. Additional hours outside of these times will be required for events and some travel. This is an on-campus role.

POSITION SUMMARY

The Director of Planned and Leadership Giving is a senior member of Salisbury School's Advancement team responsible for leading the School's planned giving program while developing and managing relationships with alumni, parents, grandparents, and friends who have the capacity and inclination to make significant philanthropic investments in Salisbury.

Reporting to the Chief Advancement Officer, the Director will provide strategic leadership for Salisbury's planned giving efforts, building a robust pipeline of current and deferred gifts and helping donors consider how charitable giving can become part of their broader financial and estate planning. The Director will also manage a portfolio of leadership and major gift prospects and donors, developing individualized strategies to qualify, cultivate, solicit, and steward these relationships.

The Director will work closely with the Chief Advancement Officer, frontline fundraisers, Advancement Services, School leadership, trustees, volunteers, and donors' professional advisors to structure gifts that meet both donor objectives and Salisbury's institutional priorities. The successful candidate will combine sophisticated gift-planning knowledge with the relationship-building skills of an accomplished frontline fundraiser.

PRIMARY ROLE & RESPONSIBLITIES

Planned Giving Strategy and Gift Development

- Develop and implement a comprehensive planned giving strategy, annual goals, and pipeline to increase current and deferred support for Salisbury.
- Identify, cultivate, and solicit planned gifts, including bequests, beneficiary designations, charitable gift annuities and trusts, appreciated securities, and other appropriate assets and gift vehicles.
- Help donors explore giving strategies that reflect their philanthropic interests and personal, family, financial, and estate-planning goals; coordinate with donors' professional advisors and Salisbury's legal and financial resources as needed.
- Ensure gifts align with School policy and are appropriately documented, recorded, valued, tracked, and reported in partnership with Advancement Services and the Business Office.

- Serve as a resource to Advancement colleagues on planned and blended giving, prospect identification, gift structures, and donor conversations; develop educational materials and opportunities with Communications and other colleagues.

Legacy Giving and Stewardship

- Lead Salisbury's legacy giving society, growing membership and engagement and identifying donors whose estate intentions have not yet been documented.
- Create meaningful recognition and engagement opportunities for legacy donors, honoring their confidentiality and recognition preferences.
- Partner with Stewardship and Donor Engagement colleagues to maintain thoughtful contact with planned, leadership, and major gift donors and demonstrate the impact of their philanthropy.

Leadership, Major Gift, and Campaign Fundraising

- Manage a portfolio of leadership and major gift prospects, advancing relationships through qualification, cultivation, solicitation, and stewardship.
- Solicit leadership annual, major, capital, endowed, planned, and campaign gifts; develop blended strategies combining current and deferred gifts when appropriate.
- Maintain an active schedule of donor visits and substantive interactions, including regional travel, and work toward mutually established goals for visits, solicitations, proposals, commitments, and dollars raised.
- Partner with the CAO, frontline fundraisers, School leadership, trustees, and campaign volunteers to identify and secure leadership-level campaign commitments and integrate planned gifts into campaign strategy and reporting.

Collaboration, Planning, and Accountability

- Collaborate across Advancement, including Leadership and Major Gifts, Annual Giving, Alumni and Parent Engagement, Advancement Services, Stewardship and Donor Engagement, and Communications.
- Maintain accurate and timely records of donor interactions, strategies, proposals, solicitations, gift documentation, expectancies, forecasts, and next steps in Salisbury's advancement database.
- Develop annual and quarterly plans, review progress with the CAO, and remain current on gift-planning practices and relevant tax and regulatory developments.

QUALIFICATIONS

- Bachelor's degree required or equivalent professional experience, with 7 years of progressively responsible advancement experience, including success with planned, major, or principal gifts and significant philanthropic solicitations.
- Working knowledge of planned giving vehicles, estate-planning concepts, and relevant tax considerations; experience facilitating planned and blended gifts strongly preferred.
- Experience in an independent school, higher education, or a relationship-driven nonprofit preferred.
- Excellent relationship-building, communication, organizational, and collaboration skills, including the ability to explain complex gift-planning concepts clearly and work effectively with donors, families, advisors, trustees, volunteers, and senior leaders.
- Sound judgment and discretion with confidential donor, family, financial, and estate information; ability to manage a fundraising portfolio alongside a comprehensive planned giving program.
- Experience with Raiser's Edge NXT or a comparable advancement database preferred; willingness to travel regularly and attend occasional evening and weekend School and Advancement events.

Key Attributes and Measures of Success

The successful candidate will be an authentic and trusted relationship builder, strategic and results-oriented fundraiser, thoughtful listener, collaborative partner, and patient steward of long-term donor relationships. Success will be measured by growth in the number and value of documented planned gifts, a stronger planned giving pipeline and legacy society, and the effective cultivation and solicitation of leadership and major gift prospects. The candidate will

also strengthen the integration of planned and blended gifts into major gift and campaign fundraising, maintain accurate gift documentation, forecasting, and reporting, collaborate effectively with the Chief Advancement Officer and Advancement colleagues, and provide meaningful stewardship that advances current fundraising results while strengthening Salisbury's long-term philanthropic foundation.

SPECIFIC REQUIREMENTS/ ESSENTIAL FUNCTIONS

- Must be able to communicate effectively to perform your job successfully.
- Must be proficient in composition of written communication.
- Must have excellent computer skills including Microsoft office.
- Must have the ability to handle multiple projects simultaneously.
- Must have superior follow through and ability to meet deadlines and goals.
- Must have the ability to work independently in a self-directed manner and in collaboration with others.
- Must have excellent organizational and planning skills, creativity, and attention to detail & accuracy.
- Must possess the ability to make independent decisions when circumstances warrant such action.
- Must have the ability to work collaboratively as part of a team.
- Must be able to follow written and oral instructions.
- Must maintain a high degree of professionalism.
- Must demonstrate ability to use good judgment and to handle confidential information with a high level of sensitivity ensuring the privacy of donors and prospects.
- Must be able to travel.
- Must have patience, tact, and enthusiasm when dealing with alumni, personnel, students, & families.

PHYSICAL & SENSORY REQUIREMENTS (with or without the aid of a mechanical device)

- Must function independently and be able to move intermittently throughout the workday.
- Must be able to cope with the mental and emotional stress of the position.
- Must possess sight/hearing senses or use prosthetics that will enable these senses to function adequately so that the requirements of this position can be fully met.
- Must be able to work in person, on campus.
- Must be flexible and willing to adapt to new technology and/or schedules.
- Must function independently.
- Must be able to travel.
- Must be able to lift, push, pull, and move equipment, supplies, etc., without restrictions.

The salary range for this position is $175,000 - $200,000. Placement in the salary range is based on relevant experience, education, skills and other factors permitted by law.

Candidates interested in this position should submit a letter of interest and resume to Tina Bunce at tbunce@salisburyschool.org.