

United Way of Southeast Louisiana

JOB DESCRIPTION

Position Title:	Planned Giving & Endowment Director	
Reports to:	Chief Strategy Officer	
Location:	2401 Canal Street, New Orleans, LA	Division: Resource Development
Classification:	Exempt	Supervises: N/A

Organization Summary: For nearly 100 years, United Way of Southeast Louisiana (UWSELA) has been a leader and trusted partner in improving lives and making a lasting difference. United Way is on a mission to eradicate poverty by preparing people for quality jobs, growing incomes, and affording better health and education opportunities throughout Jefferson, Orleans, Plaquemines, St. Bernard, St. Tammany, Tangipahoa, and Washington parishes.

Working at United Way is an opportunity to help build a stronger, more equitable Southeast Louisiana for every individual and family. You'll collaborate with coworkers and donors who are passionate about improving the quality of life for all communities.

Position Overview: The UWSELA Planned Giving and Endowment Director is responsible for leading UWSELA's Gift Planning program, working to expand UWSELA's gift planning and increase the number of endowment gifts, estate gifts, life income gifts, and blended gifts as well as increasing the strategic use of non-cash assets to leverage all giving. The Planned Giving & Endowment Director will not only manage a portfolio of UWSELA's most committed donors but will serve in a leadership role on the fundraising team. Gift planning plays a significant role in increasing revenue and gift commitments to advance UWSELA's mission for generations to come.

Salary Range: Beginning at \$75,000 commensurate with experience.

CORE COMPETENCIES for ALL UNITED WAY PROFESSIONALS:

- **Mission Focused** – top priority is to create real social change that leads to better lives and healthier communities.
- **Relationship Oriented** – understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator** – understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven** – dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward** – understands the role in growing and protecting the reputation and results of the greater network.

ESSENTIAL FUNCTIONS:

The statements below reflect the items considered necessary to describe the essential functions of the job identified and shall not be construed as a detailed description of all work requirements that may be inherent in the job.

1. Develop, implement, and report on a short- and long-term strategy for gift planning that integrates the gift-planning conversation throughout the fundraising; increases the number of estate gifts, life income gifts, and blended gifts; and increases the strategic use of non-cash assets to leverage all giving.
2. Work with the management team to develop clear strategies, goals, and outcomes to cover gift planning activities, including the annual campaign and launch of an endowment campaign.
3. Work with the marketing team to develop and execute a gift-planning marketing strategy for all communications with donors and prospects.
4. Work with UWSELA's finance team to oversee the management of trust, gift, and estate administration.
5. Implement and monitor UWSELA's stewardship of all donors who have made current gift commitments to UWSELA through life income gifts and estate commitments.
6. Design and implement a training program for fundraising staff to foster gift-planning discussions.
7. Serve as a resource for the resource development team, to support conversations with the organization's most-engaged donors and about complex gifts.
8. Manage a portfolio of 100-125 major/planned gift prospects, moving them through an ongoing cycle of cultivation, solicitation, and stewardship and working with them to develop individualized giving plans that maximize tax savings, personal philanthropic objectives, and gifts to UWSELA.
9. Participate in implementing appropriate recognition for donors, including methods for their long-term stewardship.
10. Remain current on changes in estate and tax law.
11. Record and report all planned gift results and bequest expectancies developed.
12. Collaborate with the appropriate hospital/foundation offices regarding the administration of planned gifts, including payment schedules, tax reporting, government compliance, and probate matters.
13. Build relationships with appropriate professional organizations at the local and regional level, including estate-planning professionals.
14. Establish and manage a network of professional advisors in the communities served by UWSELA.
15. Perform other job-related tasks as assigned.

JOB QUALIFICATIONS:

1. Bachelor's degree or graduate degree; law degree is a plus.
2. Seven or more years of hands-on, relationship-based fundraising, three years of which must have been in gift planning.
3. A proven record of success in closing planned and major gifts.
4. A thorough knowledge of gift planning vehicles and tax codes related to gift and estate planning.
5. Strong computer skills, including all Microsoft applications (Word, Excel, and PowerPoint).
6. A history of attendance at professional seminars, conferences, and related training.
7. Strong interpersonal skills with the ability to communicate effectively with UWSELA's internal and external constituencies.
8. A positive public presence with the capability of being accepted as a credible representative of UWSELA within the philanthropic and professional community.
9. Excellent oral and written communication skills.
10. A strong team orientation.
11. Excellent problem-solving skills.
12. Strong project management skills.
13. The initiative and ability to set goals and follow through with little direct supervision.
14. The ability to use good judgment and ethics in handling confidential materials with sensitivity and discretion.

