



**PARTNERSHIP DEVELOPMENT OFFICER
Planned and Individual Giving**

NATURE OF WORK

This is professional development work responsible for planned and individual giving for the foundation. The incumbent is responsible for building a planned giving program and strengthening the organization's individual giving efforts, in cooperation with major gift staff and others. The position involves identifying, cultivating, soliciting, and stewarding both planned and annual individual gifts, as well as communicating closely with NIH to identify and develop appropriate programs for funding; sustaining existing donor relationships; and achieving annual and long-term funding goals. Work is bound by standard office policies, practices and procedures. Work is performed under the direction of the Director, Partnership Development.

ESSENTIAL FUNCTIONS

Establishes and manages a new planned giving program, developing and implementing strategies to meet short-term goals and position the foundation to meet longer-term planned giving goals.

Solicits planned gifts via individual face-to-face meetings with potential donors, written communications, and other means; identifies and cultivates potential new planned giving donors; builds awareness of programs and networks with others who advise potential donors; sets up agreements/documentation for any new planned gifts and stewards all current planned giving donors.

Manages Small Fund development; works with individuals and/or estates to establish new Funds and other designated support programs; manages/stewards existing and new small Funds.

Manages annual campaign; solicits gifts of less than \$1,000, (corporations, foundations, or individuals); handles all aspects of all direct mail appeals; coordinates with online fundraising staff; stewards donors and identifies/cultivates them for larger and/or planned gifts.

Organizes and conducts planned giving cultivation and solicitation visits and other outreach for Executive Director and CEO, Director of Partnership Development, self and/or other key staff; prepares briefing materials and coordinates participation of programmatic and/or scientific experts.

Develops, prepares, and manages budgets relating to portfolio, monitors projects and expenses, reconciles as needed with Finance Department; tracks and monitors reporting deadlines; develops reports and distributes to donors. Ensures all related donor and prospect information, contact reports, deadlines and related gifts are properly recorded and acknowledged in a timely fashion; ensures timely entries into Raiser's Edge database; establishes and maintains comprehensive files and other records on all programs in portfolio.

Supports Partnership Development Department efforts, assists with projects outside of the established portfolio as necessary, and functions as part of the overall Partnership Development team.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

Work is performed in an office environment and involves everyday risks or discomforts which requires normal safety precautions when operating equipment and performing the work. Work is essentially sedentary with occasional walking, standing, bending, carrying items under 25 pounds such as books, papers, small parcels, etc...

MINIMUM QUALIFICATIONS

Work requires a Bachelor's degree with three to five years of nonprofit fund-raising experience. Some planned giving experience is essential; individual/annual giving experience a plus, as well as a combination of education and experience that provides the following knowledge, skills and abilities:

Knowledge of and experience with current and effective fundraising tools, techniques and practices, especially for planned giving.

Knowledge of fundraising in a non-profit environment.

Knowledge of modern office practices, procedures and equipment.

Knowledge and proficiency in Microsoft Office package and programs. Familiarity with Raiser's Edge is a plus.

Ability to demonstrate tact and diplomacy when working with others.

Ability to develop and maintain a working budget.

Ability to communicate effectively both orally and in writing.

Ability to demonstrate initiative and work independently.

Ability to multi-task and handle multiple projects at one time.

Ability to perform under pressure or within tight deadlines.

Ability to assist with tasks at all levels.

Ability and flexibility to travel, as necessary.

Skill in demonstrating creative and strategic thinking.

LICENSES, CERTIFICATION AND OTHER REQUIREMENTS

None.