

SOUTHWEST INITIATIVE FOUNDATION POSITION DESCRIPTION

Position Title: Senior Major and Planned Gifts Officer

Status: Full Time, Exempt

Reports to: Vice President/COO

Location: Field Office Option

Position Overview

The Senior Major and Planned Gifts Officer is responsible for identifying, engaging, soliciting, and stewarding prospective donors for major and planned gifts to ensure a strong base of support for Southwest Initiative Foundation through growth in the unrestricted endowment, mission-driven field of interest endowments, donor-advised funds, and legacy gifts of all types.

Major Duties and Responsibilities:

Major Gifts

1. Actively manage a portfolio of 150 – 200 major and planned gift prospects.
2. Meet monthly benchmarks for prospect interactions and annual benchmarks for fundraising goals.
3. Equip and support the President/CEO in the acquisition of major gifts through key stakeholder relationship building.
4. Primarily through personal visits and other relational approaches to fundraising, develop strategies to generate gifts to the Growing Home Circle.
5. Develop and implement strategies to secure and grow mission-driven field of interest and donor-advised endowment funds that both meet the philanthropic goals of donors and support SWIF's mission.
6. Prepare and submit regular reports on all contacts with donors, prospects, and volunteers, and maintain sufficient records, contact reports, and background data to effectively manage the donor relationship.

Planned Gifts

7. Coordinate and implement the planned giving program to include the full range of gift planning tools, from simple wills to gift annuities and trusts.

8. Working collaboratively with other staff and legal counsel, develop and implement strategies to market *Keep it Growing* ... Southwest Minnesota's Farmland Retention ProgramSM.
9. Prepare gift proposals, including planned gift illustrations, for prospective donors to SWIF and its community and designated funds.
10. Provide leadership and expertise in the area of planned giving through education and networking in the region.
11. Develop strategies and execute marketing plans to promote planned gifts among stakeholders through personal visits, web presence, phone, mail and other media.
12. Strategically build relationships with key attorneys, financial planners, bankers, accountants, insurance agents and others in a position to advise clients regarding their charitable interests.
13. Ensure that all major and planned giving donors receive appropriate, consistent recognition and an accounting of the impact that their gift has on the region through regular communication.

Organizational Leadership

14. Lead and manage the functions of the major and planned gifts programs including budgeting and program direction.
15. Provides strategic information and guidance to assist in establishing overall fundraising goals, plans, and procedures.
16. Participate in monthly strategy team and staff meetings.
17. Organizes or participates in other initiatives to promote the Southwest Initiative Foundation and philanthropy as assigned.

Knowledge, Skills and Abilities

- Ability to acquire and apply broad knowledge of fundraising practices and principles
- Excellent analytical, strategic planning, organizational and time management skills
- Excellent written, verbal and interpersonal communication skills
- Ability to travel regionally and throughout the country to identify, engage and solicit donor prospects
- Ability to thrive at working under pressure against deadlines and competing priorities
- Ability to work independently as well as in a collaborative, team environment
- Ability to embrace change and look forward to the next challenge and opportunity
- Must embody a commitment to professionalism and excellence

- Must have passion for southwest Minnesota and an understanding of rural philanthropy and values
- Must embrace SWIF's core values of Integrity, Ethical Behavior, Inclusiveness, Innovation, Creativity, and Progressiveness

Minimum Education/Experience Requirements

Bachelor's degree in business, marketing, communications or a related field with 8+ years experience developing tailored approaches and meaningful relationships that led to successful partnerships. A strong sales background as well as specific fundraising and planned giving experience will be considered.

Reports To: Vice President/COO

As of Oct. 26, 2011