

**Planned Giving Officer**

**Position Title:** Director of Planned Giving **Office:** Care Net or remote

**Exempt/Non-Exempt**: Exempt

**Reports To:** VP of Donor Relations **Date:**

**Current Staff:**  Open

**Direct Reports:** None

The Planned Giving Officer (PGO) will report to the VP of Donor Relations, and will have extensive interaction with the major donor and mid-major donor officers, and select members of the Development Operations team.

Acting as Care Net’s expert on planned giving, the PGO will be responsible for all aspects of the Planned Giving Program. This program will include multi-channel marketing via direct mail, digital communications, and personal interaction with Care Net’s donors at all levels. The PGO will make use of Care Net’s planned giving platform, FreeWill, to implement a robust program which will lead to an increase in bequest and other legacy giving commitments, gifts through IRA distributions, gifts of appreciated stocks, and other sophisticated non-cash giving.

Specific responsibilities are the following:

1. Develop for executive management approval a Gift Acceptance Policy.
2. Working directly with the Marketing Representative from FreeWill, implement a comprehensive marketing plan to Care Net’s existing donors. Marketing will include:
   1. Including Planned Giving information to donors in existing donor direct mail communications, specifically bi-monthly donor newsletters, acknowledgment letters, donor survey, and other pieces by providing to the Dev Ops team copy related to targeted planned giving programs.
   2. Providing copy and desired queries of our donor database to the digital marketing team to reach donors via direct emails, via our website, via social media platforms.
   3. Manage comprehensive, multi-channel, continuous Communications Plant to all donor and non-donor segments
3. Develop and produce (with the assistance of CN’s Graphic Designer) various materials for use in marketing the planned giving program. This includes: Guide to Estate Planning, What My Family Needs to Now when I Pass, information sheets on various planned giving vehicles (wills, IRA gifts, stock, etc.), inserts for various letters, etc.
4. Respond to all incoming inquiries from CN donos for information on planned giving, to include:
   1. Responses to various outbound marketing efforts via mail, digital, social media
   2. Donor inquiries specifically on how to make a planned gift immediately, or a commitment to a legacy gift
   3. Assist donors in use of the FreeWill platform when requested
5. Initiate contact with donors belonging to targeted groups most-likely to make a planned gift to Care Net. This includes communication to individual donors via email, mail, and phone calls. When appropriate, PGO will make personal visits to donors. Targeted groups include: donors already giving through IRA and Donor Advised Fund accounts, who have given for certain milestone number of years (20, 15, etc.), who give through our Caring Partners monthly stustainer program.
6. Maintain personal and individual contact and stewardship with donors who make planned gifts or commitment of legacy gifts
7. Develop, implement, and maintain a “legacy giving club” for Care Net’s donors who make a commitment to a legacy gift.
8. Educate the MD&F staff at a high level on planned giving options for donors, and how to approach the topic of this with donors.
9. Produce periodic reports from the donor CRM on actual and committed planned gifts, contacts with donors, and marketing efforts.
10. If located remotely, the PGO will travel to the HQ office on a periodic basis to participate in training, team meetings, etc. The PGO will also travel to the CN National Conference on an annual basis, and will participate in training workshops for our pregnancy centers conference attendees as needed.

**Requirements**

* Is a committed Christian who demonstrates a personal relationship with Jesus Christ as Savior and Lord
* Keeps Christ central in our individual and corporate lives and shares the Gospel of Jesus Christ. Attends and participates in daily staff devotions, regular prayer and fasting
* Possesses a strong commitment and dedication to the pro-life position and related sexual purity/health issues.
* In-depth knowledge of the donor cultivation cycle; subject-matter expert in planned giving
* Exceptional communication skills, both in writing and orally, to a variety of stakeholders (senior managers, donors/foundation, board of directors)
* Agrees with Care Net’s Statement of Faith and Mission/Vision, and will seek to conduct him or herself according to the Core Values and Employee Conduct Policy.

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**Prepared By:**

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employee Acknowledgement:**

I have read and understand the Position Description for the position I hold at Care Net. A copy of the Position Description has been given to me for my records. I acknowledge, understand and agree that:

1. It is for the purpose of information and to assist me in the performance of my position at Care Net.
2. It does not constitute an employment contract with Care Net.
3. It does not confer any rights for any employee.
4. It is subject to change at any time without prior notice.
5. It is the property of Care Net.

I understand and agree that my employment with Care Net is “at will” and may be terminated at any time, with or without cause, for any or no reason, and with or without prior notice.

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Original:** Employee’s Personnel File **Copy:** To Employee **Copy:** Position Descriptions File