

**The Salvation Army**  
**Director of Gift and Estate Planning**  
Michigan, United States

**Job Description**

The primary purpose of the position is to identify, cultivate, solicit, secure, and steward individual prospects and donors, targeting planned gifts for The Salvation Army, Great Lakes Division. Incumbents in the position actively participate in the implementation of the Divisional Headquarters (DHQ) philanthropic campaigns and plans, focusing on Planned Giving fundraising priorities and involving volunteers and other stakeholders in the realization of Great Lakes Division goals.

**Essential Duties and Responsibilities**

This job description should not be interpreted as all inclusive. It is intended to identify the essential functions and requirements of the position. Other job-related responsibilities and tasks may be assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential job duties and responsibilities that follow:

- Helps assure that the division achieves its fundraising goals in collaboration with others within the Development Department and interdepartmentally.
- Manages a prospect portfolio of approximately 125-150 planned giving donors and prospects as follows:
  - Develops solicitation plans for new and current planned gift donors and prospects within prospect and suspect portfolio
  - Develops relationships with assigned donors and prospects through various cultivation calls, letters and handwritten notes, with an emphasis on successful face-to-face meetings
  - Completes an assigned number of significant contacts per year with donors and prospects from portfolio, ranging from 280 to 400 annually
  - Solicits and closes planned gifts in accordance with annual goals as set by the Senior Director of Philanthropy in consultation with leadership and the Territorial Planned Giving Director
- Develops and writes donor cultivation materials, acknowledgements, volunteer solicitor briefings and reports. Produces personalized planned giving proposals for individual support.
- Contacts and cultivates persons identified through marketing efforts and relationships developed with Corps and Division staff, professional advisors and other referral sources.

- Coordinates and provides assistance in the design of strategies for cultivating and soliciting donors in coordination with senior staff, leadership and volunteers.
- Works with other Development staff to identify, qualify and research new planned gift prospects.
- Works with the Senior Director of Philanthropy, Executive Development Director and major gift staff as part of a team of fundraisers for the Division, including joint strategy sessions and other matters important for an effective development effort.
- Identifies innovative development, cultivation and stewardship activities; crafts new strategies and support planning that will strengthen the Planned Gifts Program over time.
- Assists in the organization of occasional events and small donor meetings for cultivation and stewardship purposes.
- Develops a documented plan to achieve endowment and planned gift goals from assigned portfolio.
- Prepares and submits statistics, reports and budget information to the Senior Director of Philanthropy as requested.
- Manages and executes other duties as assigned.

#### **Staff Supervision:**

- Does not manage staff

#### **Fiscal Management:**

- Monitors assigned budgets

#### **Working Conditions**

The majority of work activities are performed in an office setting and, in the residences, or work locations of donors and prospective donors. There are normally no hazardous or significantly unpleasant physical working conditions. A significant amount of time must be spent outside the home to complete essential work requirements position. The position requires frequent local travel, primarily using one's personal vehicle, to visit donors, prospective donors and other relevant contacts in the community within a predetermined territory of responsibility.

## **Qualifications**

- Bachelor's degree required, other considerations include an advanced degree in a related field such as law, finance or non-profit management, or proven committee/board experience; a certification is a plus, such as CFP or CAP designation. Those without such a certification are expected to obtain a certification within 2 years of start of employment.
- A minimum of five years' experience, in fund raising (including significant experience in personal solicitation, and familiarity with fundraising practices), financial sales, insurance sales, estate and financial planning, or other related areas is preferred.
- Successful track record of fundraising with major and/or planned gift donors is a plus.
- Experience working with high-level volunteers, donors and program staff on collaborative activities.
- Experience, familiarity and/or ability to work in a complex non-profit organization with many departments, programs and fund-raising priorities.
- Familiarity with issues of fundraising and general professional and workplace ethics.

## **Required Skills and Capabilities:**

- Ability to work well with a variety of people in a dynamic environment; high energy; focus; collaborative spirit.
- Self-directed and proactive, ability to take the initiative without direction
- Able to manage confidential information with discretion.
- Detail-oriented with a strong focus on quality and accuracy.
- Strong interpersonal skills and ability to work comfortably with donors is required.
- Computer literacy including proficiency in the use of Microsoft Windows including Word, Excel and PowerPoint. Proficiency in the use of email applications such as Microsoft Exchange or Lotus Notes.
- Mature judgment and effective reasoning skills; ability to process and interpret complex information as well as make independent and effective decisions without close supervision.
- Above average written and oral communication skills including making well organized and impactful presentations.
- Strong organizational skills and the ability to work efficiently.
- Ability to be influential and persuasive in dealing with donors and other members of the community and colleagues at The Salvation Army.

- Strong numerical reasoning skills sufficient to compute profit and loss; ratio and proportion and percentage for budget management and projections.

### **Additional Requirements:**

- Passing The Salvation Army's background check and drivers' qualification.
- Ability to travel in community, and throughout the Division.
- Satisfactory completion of the Safe From Harm training program within the first ninety (90) days of employment.

### **Additional Information**

The Salvation Army offers the following benefits:

- Health Care Benefits which include:
  - Medical
  - Dental
  - Vision
  - Hearing
  - Flexible spending accounts
  - AFLAC
  - Voluntary life insurance benefits
- Short-Term and Long-Term Disability options
- Pet Insurance
- Pension contributions (currently 6.0% of your earnings) begin the first quarter after 1 year of employment.
  - Vesting starts after three years of employment, 100% vested after five years of employment
- The Salvation Army also offers a 403(b) voluntary retirement savings plan in which you may participate immediately, with approved vendors. There is currently no organizational match for 403(b) contributions.
- Employee Discounts
- Paid Time Off which includes:
  - Sick days begin accruing the first of the month after one full calendar month after employment begins, and you may begin to use sick days after (90) days of employment.
    - Up to (4) earned sick days per year may be used as discretionary days.
  - Vacation begins accruing the first of the month after one full calendar month after employment begins, and you may begin to use vacation days after (90) days of employment.

- The accrual rate is based upon years of service and approved hours worked.
- You will receive up to 2 personal days and 2 floating holidays per year based on date of hire.
- Birthday off with pay.
- Paid holidays are effective immediately.

*The Salvation Army is an equal opportunity employer. Candidates who are back-to-work, US Veterans, people with disabilities, people who have been impacted by the justice system, and/or people without a college degree are encouraged to apply.*

**Mission Statement:**

The Salvation Army, an international movement, is an evangelical part of the universal Christian Church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.