



Position Description

Position Title: Planned Giving Coordinator

Department: Institutional Advancement

FLSA Status: Full Time, Non-Exempt

Position Summary

Ashland University, ranked by *US News and World Report* as a top tier University, is seeking a Planned Giving Coordinator with a background in paralegal studies, accounting, business or similar academic background to join the Planned Giving Team. Reporting to the Associate Director of Planned Giving, the Planned Giving Coordinator provides support for all programs in the Planned Giving Department and serves as a primary source of program information to support Institutional Advancement leadership, major gift officers and other development colleagues, donors and vendors.

The Planned Giving Coordinator will also oversee the management of donor involvement with endowed gifts and endowed scholarships for the University. The Planned Giving Coordinator is responsible for the account administration for life income agreement gifts using accounting software and for maintaining the accuracy of donor information records, recognition society membership lists, preparing and generating reports. The position is also responsible for providing administrative support for the Associate Director of Planned Giving, including meeting scheduling and support, file maintenance and managing time sensitive mailings.

Essential Knowledge and Skills

- Self-motivated and able to work independently.
- Accounting/Mathematical aptitude.
- Attention to detail.
- Able to handle frequent interruptions and fast-paced work environment.
- Outstanding oral and written communication skills.
- Excellent interpersonal skills with the ability to interact with high level donors
- Strong customer service orientation.
- Able to maintain confidentiality.
- Able to prioritize, organize, and manage multiple projects and tasks simultaneously.
- Strong computer competency with Microsoft Windows - Word, Excel, and PowerPoint skills.
- Computer competency with database management / CRM software, and planned giving software is also desired.

Essential Position Duties and Responsibilities

- Provide general planned giving support. Computer competency with database management / CRM software, and planned giving software also desired
 - Coordinate and complete clerical work for the Planned Giving office including creating and modifying documents using word processing or spreadsheets, Colleague database upkeep, photocopying, expense report accounting, correspondence, processing mail and maintaining the office filing system.
 - Generate reports, memorandums, correspondence, presentation materials, personal donor profiles, spreadsheets and graphics that may be confidential in nature.
 - Work with the Associate Director of Planned Giving, vendors, and other stakeholders to maintain schedule of payments and record keeping for life income agreement instruments such as charitable trusts and gift annuities.
 - Manage AU owned life insurance policies to ensure timely premium payments.
 - Manage and reconcile the budget for the Planned Giving department.
 - Provide phone and email coverage for the planned giving department
 - Prepare and submit expense reports and check requests as needed to support the Associate Director of Planned Giving.

Specific Duties

- Stewardship
 - Working with the Associate Director of Planned Giving and the Associate Vice President of Institutional Advancement, establish a structured, systematic stewardship program for planned giving donors that will outlast changes in personnel and ensure perpetual cordial relations with donors.
 - Implement and manage planned giving stewardship programs including updating database information, recognition societies, and giving clubs. Insure accuracy of information to encourage future philanthropy.
 - Coordinate stewardship mailings including birthday, anniversary, holiday and year-end mailings.
 - Coordinate and participate in donor recognition events.
- Endowed Scholarships
 - Oversee endowment process and maintain scholarship information.
 - Oversee management of donor involvement in endowments and endowed scholarships for the university.
 - Communicate with endowed scholarship donors regarding status of scholarships and stewardship events.
 - Annually review, combine and adjust data from Financial Aid, Donor Records, and the Business Office for endowed scholarships for donor reports and stewardship events.
 - Update records regarding endowed scholarship donors & endowment plaques across campus annually.
 - Coordinate thank-you note writing days and photo composites process.
- Testamentary Commitments
 - Support testamentary commitment entry, recognition and reporting, working in conjunction with Advancement Services.
 - Support the coordination, development, and implementation of bequest initiatives including the implementation of a cultivation and stewardship strategies.

- Life Income Agreements
 - Prepare post-gift correspondence and gift administration once a life income gift is received. Maintain records of planned giving growth and planned giving prospects on a regular basis. Prepare CGA registrant materials for regulated states (annually).
 - Responsible for the proper and complete entry of gift information into Colleague database.
- Publications/Promotions
 - Coordinate regular printed and electronic planned giving publications including newsletters, e-newsletters, and mailings. This includes the preparation of the materials, responses, and reporting results.
 - Assist in doubling the Endowment Fund by 2020 (Ashland Rising) by updated collateral materials, promotions, mailings, and possible event planning.
 - Coordinate implementation of planned giving marketing activity, including print, electronic and in-person formats.
 - Coordinate mailings based upon specific gift objectives, for example, IRA Rollover, CGA annual mailings, CRT annual mailings, bequest mailings, etc.
- **Internal and External Contacts**
 - In addition to supporting the Planned Giving Department, this position will work in conjunction with all areas of Institutional Advancement at Ashland University, including Advancement Operations, Major Giving, Annual Giving, University Grants and Foundation Relations and Alumni Engagement. The Planned Giving Coordinator may also work with Marketing, Public Relations, and the Office of the President.
 - The Planned Giving Coordinator will have regular contact with planned giving and major donors, annual giving donors, alumni, faculty & staff, retired faculty and staff, Ashland University executive leadership, and outside vendors.

Working Conditions and Physical Requirements:

- Ability to sit/stand for extended periods of time.
- Ability to travel (car/plane).
- Ability to work evenings and weekends as needed.

Position Requirements

Education:

- Associate's degree in Paralegal Studies, Business, Accounting, or related academic background required.

Experience:

- Three or more years related work experience, preferably in higher education, gift planning, legal, financial, or other similar settings.

Application Procedure:

All applicants must submit 3 professional references and apply for the position at the Ashland University Human Resources website at:

<https://www.ashland.edu/administration/content/planned-giving-coordinator-institutional-advancement>

This position description is intended to be a general overview of the major responsibilities, duties and qualifications necessary to perform the job. Other responsibilities and duties may be assigned by the supervisor. The position description should be revised in the event there are substantial changes in the work to be done and/or the qualifications deemed necessary to perform the job.