

Position Number: D93307

Job Title: Director of Principal and Planned Gifts

Department: University Development

FTE: 1.0 benefits eligible

Job Type: Administrative

Posted Date: 1/17/12

Position Summary:

The Director of Principal and Planned Gifts reports to the Associate Vice President for Development and will be a key member of the senior development team. The position plays a vital role in developing sophisticated contributed revenue strategies for Portland State University (PSU) that will impact its growth over the next five years. The overarching challenge for the new Director of Principal and Planned Gifts will be to combine high-level strategic thinking with a firm grasp of the “nuts and bolts” of creating and executing a successful Planned Giving program. He/she will be responsible for the direction, planning, and implementation of the Principal and Planned Giving program. Additionally, this individual will partner with other senior development team members and Portland State University Board leadership to leverage donor portfolios to drive principal gifts. The Director will also interface with current and past PSU Foundation Board members to support Board engagement and ongoing recruitment efforts.

Major Responsibilities:

Principal Gifts/Endowment and Gift Stewardship (55%)

- Serve as a lead principal (\$1,000,000+) gifts fundraiser
- Perform required stewardship of existing endowment and other leadership (\$1,000,000+) gifts donors, including reports, and requests for pledge payments, and recognition activities.
- Work closely with the Vice President for University Advancement, Associate Vice President for Development and volunteer leadership to identify and engage prospects.
- Remain well informed of all current PSU programs, projects, and available gift opportunities to secure principal gifts and endowment commitments in response to donor interests.

Planned Giving (45%)

- Cultivate, solicit, and manage a portfolio of planned giving prospects, including PSU legacy and endowment donors, patrons, and allied professionals (i.e., attorneys, financial planners, etc.). It is expected that the Director of Principal and Planned Gifts will maintain a portfolio of 125-150 prospects and donors.
- Promote planned giving through direct and indirect mediums (i.e. seminars, targeted mailers, etc.) and explore expansion opportunities for marketing the program online and through electronic communication.
- Keep up-to-date on planned-giving techniques and changes affecting charitable giving, including attending planned-giving seminars and courses.
- Oversee the design, planning, and execution of direct-mail campaigns and provide regular mailings of motivational materials to prospects to generate an awareness of PSU’s fundraising priorities

Organizational Support (5%)

- Represent PSU in a professional capacity at PSU fundraising events, as well as numerous other civic and community events and forums.
- Establish procedures for tracking, rating, and qualifying prospects and for recording and reporting gifts. Regularly review and develop recommendations for gift acceptance policies and ensure that existing policies are followed.
- Prepare and submit regular reports on all contacts with volunteers, donors, and prospects.
- Promote a collegial atmosphere within the development department, working cooperatively with all fundraising officers to help them and the department attain their overall financial and stewardship goals.

Traits and Characteristics:

The Director of Principal and Planned Gifts should be a results-oriented leader who can create and execute a fundraising program quickly and confidently. The successful candidate needs to possess a demonstrated ability to think strategically and to understand how to implement his/her ideas successfully. This important member of the senior development team must have exceptional organizational and administrative skills, with the ability to plan, set goals and objectives, organize, and follow-through, valuing practical accomplishments, results, and rewards. He/she must have a strong sense of self-management, with an outstanding ability to set priorities and complete multiple tasks simultaneously in order to deliver desired outcomes within allotted time frames. The overall ability to set, pursue, and attain achievable goals, regardless of obstacles and circumstances, will be a key quality. The successful candidate should demonstrate an ability to initiate and sustain momentum without close supervision.

The Director of Principal and Planned Gifts should be service oriented and possess strong interpersonal and communication skills with the ability to articulate compelling messages for support that generate enthusiasm and commitment among stakeholders. He/she will have frequent interaction with others and must work collaboratively with all levels of staff, volunteers, donors, and prospective donors. The successful candidate must exhibit a polished presence, positive attitude, diplomacy, discretion, and a deep respect and understanding of principal gift-level donor and trustee relations. The Director of Principal and Planned Gifts should be goal oriented and results driven with an understanding of how to effectively build consensus with a sense of immediacy in achieving fundraising goals, as well as a great appreciation of the teamwork required to succeed organizationally.

The Director of Principal and Planned Gifts will have the capacity to embrace challenges and thrive in an entrepreneurial environment where creative ideas and close collegial relationships are appreciated. Strong intellectual curiosity – an independent thinker who is capable of developing his/her own ideas and thinking outside the box – is greatly valued. Responding quickly to new fundraising opportunities and changing priorities will be a key trait of this position. Must show initiative and strong problem resolution skills and be able to participate successfully in a fast-paced, team-oriented environment that is constantly changing. Ability to adjust schedule as needed for support at functions, which frequently occur on evenings and weekends.

Required Qualifications:

- Bachelor's degree is required
- Minimum of 7-10 years of experience in an impactful fundraising environment with a focus on major gifts
- Excellent understanding of strategic campaign techniques and other campaign development tools
- Evidence of leadership role in closing principal/leadership (\$1,000,000) gifts
- Knowledge of the higher education philanthropy community is ideal, as are a strong interest in and passion for the equal access to higher education
- Evidence of excellent oral communication and writing, editing, and presentational skills
- Solid understanding of fundraising databases, including segmentation, tracking, and donor research capabilities
- Overall computer literacy and proficiency with Microsoft programs, and the ability to learn other software programs as needed.
- Experience with social media tools and/or the ability to oversee their application
- Demonstrated experience as a leader and member cross-functional teams
- Working knowledge of planned giving, financial and/or estate planning concepts

Preferred Qualifications:

- Graduate or professional degree
- CFRE certification
- Previous experience with a complex doctoral research institution

Portland State University

Nationally recognized as a leader in community engagement, PSU is the largest and most diverse university in Oregon with approximately 29,000 students. Located in Portland, one of the nation's most livable cities, the university's innovative approach to education combines academic rigor with extensive internships and projects with community partners. The university's 49-acre urban campus exhibits PSU's commitment to sustainability through green buildings and transit-oriented development, while many of its 200 bachelor's, master's and doctoral degree programs incorporate sustainability into the curriculum. PSU's motto, "Let Knowledge Serve the City," inspires the teaching and research of an accomplished faculty. Five themes guide PSU's work: provide civic leadership through partnerships, improve student success, achieve global excellence, enhance educational opportunity, and expand resources and improve effectiveness.

Compensation

The starting annual salary rate for this position will be dependent upon qualifications and experience. The total compensation includes an excellent benefits package including generous healthcare, retirement, and vacation package; and reduced tuition rates for employee, spouse or dependent at any of the Oregon University System schools.

To Apply

Interested candidates should submit a cover letter that addresses the required qualifications using examples where possible; resume; salary history; and the names, addresses, and telephone numbers of at least three references. Candidates should also supply examples of previous work that highlight skills necessary for this job.

Application materials should be submitted via email to flavia@pdx.edu with "Principal and Planned Giving Director position" in the subject line.

Review of applications will begin immediately and the position will remain open until filled.