



MAJOR GIFTS OFFICER POSITION DESCRIPTION

EFFECTIVE DATE: <u>05/18/2022</u>	REPORTS TO: <u>VPIA and AOW Exec. Director</u>
DIVISION: <u>Institutional Advancement</u>	SUPERVISES: <u>N/A</u>
DEPARTMENT: <u>Development</u>	DRIVING CLASS: <u>Required</u>
FLSA CLASS: <u>Exempt</u>	BENEFITS: <u>Eligible</u>
FTE STATUS: <u>1.0 (Full-time)</u>	

GENERAL SUMMARY:

The Major Gifts Officer develops and implements fundraising strategies and activities to carry forward the mission and vision of America On Wheels (AOW), Major Gift and Planned Giving Program. This position initiates, maintains, and grows major donor relationships and identifies prospects with the potential of generating gifts at or above the \$10,000 level. The Major Gifts Officer will spend a significant amount of time stewarding donors while connecting their passion and interest in automobiles, historic preservation, and education with opportunities to financially support America On Wheels' vision and mission.

The Major Gifts officer reports to the Vice President for Institutional Advancement (VPIA) in conjunction with the Executive Director for AOW and performs a majority of work independently while exercising professionally sound judgment and discretion. This position is physically located at America On Wheels, in Allentown, PA.

Responsibilities include, but are not limited to: Major gift cultivation, solicitation and stewardship; Oversight of high-level AOW member relations and membership growth; Promotion of America's Automotive Trust (AAT), and AOW development initiatives, strategic planning; Budget development and oversight; Program development and implementation; Public presentations; and Report preparation.

The incumbent to this position must possess significant, demonstrable experience and success in major gift development, a familiarity with planned giving, an in-depth understanding and skill in the donor stewardship process, and understanding of grant research, application, and administration, and the ability to effectively articulate the mission of the organization to varied constituents.

This position description has been designed to indicate the general nature and level of work performed by jobholders within this role. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to the job. The requisites described within this position description are representative, but not all-inclusive, of the knowledge, skills, and abilities required for this position. To perform the job successfully, an employee must perform each essential responsibility satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

Initials

Date Received

PRIMARY OBJECTIVES:

1. Build a sustainable Major Gift Program generating funds to strengthen the financial resources of AOW;
2. Procure long-term, regular financial support for AOW through cultivation, solicitation, and stewardship of major and giving prospects and ensuring donors and prospects remain informed about the organization's mission, needs, and giving opportunities;
3. Create and execute major gift development programs that utilize best practices to meet fundraising goals and corporate objectives;
4. Collaborate with the Advancement and Executive Team to provide a vibrant membership program for AOW's, and ensure effective identification, cultivation, and stewarding of donors at these levels.

MAJOR RESPONSIBILITIES:

1. Plan, implement, and oversee an effective major gift department within the Institutional Advancement Division for AOW;
2. Shepherd prospective benefactors through the major gift processes, inviting the gift, closing the solicitation, thanking, recognizing, and reporting;
3. Establish and maintain a dynamic portfolio of no less than 150 active major gift prospects in all phases of qualification, cultivation, solicitation, and stewardship;
4. Oversee the creation, implementation, and monitoring of the major gift program for AOW's budget including tracking income and expenditure, authorizing disbursements, financial analyses, and preparing reports;
5. Plan, implement, and oversee membership development efforts for AOW.

QUALIFICATIONS:

The incumbent for this position must possess a Bachelor's degree (Master's degree preferred) and 5-years of significant, successful fundraising experience in the cultivation, solicitation, and stewardship of benefactors with a demonstrated record of securing gifts of \$10,000 and above. Demonstrated success in Major Gift fundraising in a large non-profit or educational institution is highly desired, as is experience in planned giving. Relevant education or experience may substitute one for another on a year for year basis.

Additionally, the incumbent must possess:

1. The ability to pass an in-depth background investigation including criminal history, employment records, and personal references;
2. A valid driver license with the ability to drive a personal vehicle for business purposes;
3. Demonstrable experience and success in major gift development at the level of 50K and above;
4. The understanding of financial, legal, and income tax implications involved in charitable giving;
5. An in-depth understanding and skill in stewarding donors;
6. Experience in budgeting and financial management;
7. Effective project management skills, attention to detail, and ability to drive projects toward successful completion;
8. Strong skills in strategic planning, goal setting, and goal fulfillment;
9. A solid proficiency in the English language with strong professional communication skills including, the ability to communicate and work effectively with a variety of internal and external stakeholders;

Initials

Date Received

10. Outstanding presentation skills and the experience and proclivity to be an outgoing spokesperson, relationship builder, and fundraiser;
11. A demonstrated record of collaboration with others –board members, staff, volunteers, and donors— around the accomplishment of strategic objectives;
12. The skill and ability to work independently with general instruction and minimal supervision while maintaining a team-oriented approach and attitude;
13. The interpersonal skills, sensitivity, and ability to professionally interact with a diverse range of people of all ages, socio-economic groups, and personality types;
14. An ability to effectively multi-task and coordinate between different projects and/or departments and agencies while remaining organized and solution focused;
15. An ability to thrive in a fast-paced, dynamic environment, with high expectations for professional outcomes;
16. Proficient skills in the use of MS Word, Excel, Power Point, Outlook, and Web browsers;
17. The ability to critically analyze and resolve quantitative, logistical, and motivational problems;
18. The ability to stand and sit for extended periods of time, bend stoop, and twist regularly, manipulate items with fingers frequently, operate a computer regularly, visually inspect displays/monitors, and effectively communicate verbally, and in written format, with guests, employees, management, and stakeholders regularly.

PREFERRED QUALIFICATIONS:

1. Demonstrated success in Major Gift fundraising in a large non-profit or university;
2. An innovative and creative approach to major fund development;
3. A familiarity and appreciation for historic and collectible vehicles.

WORKING CONDITIONS:

1. Exposure to a combination of office, shop, commercial retail, commercial food, and outside environments;
2. Minimal exposure to cleaners and various other chemicals;
3. Minimal exposure to dust, gases, and fumes.

RESPONSIBILITIES:

CULTIVATION, STEWARDSHIP & FUNDRAISING:

1. Oversee the Major Gift Prospect Management System ensuring a regular program exists to identify, qualify, and assign prospects through the Altru database to appropriate fundraising staff;
2. Create a sustainable, long-term major gift fundraising program for AOW;
3. Develop, review, and deliver major giving policies and processes to support the effective identification, cultivation, solicitation, and stewarding of gifts;
4. Establish and maintain a portfolio of no less than 150 active prospects for major gifts;
5. Shepherd prospective high-level and major and planned gift benefactors through the gift process from inviting the gift, and closing the solicitation, to thanking, and recognizing the donor;
6. Ensure that the ongoing process of major gift prospect review meetings is implemented involving the Advancement and Executive Team, as appropriate;

Initials

Date Received

7. Collaborate with other Advancement and Executive personnel of AAT and its affiliates to provide for an effective major gift development operation;
8. Participate in annual Institutional Advancement Department's strategic and operational planning process to provide an effective annual plan for AOW;
9. Collaborate with Marketing & Communications Department personnel for the promotion of major giving efforts.

HIGH-LEVEL MEMBERSHIP MANAGEMENT:

1. Oversee the development and execution of membership events and gatherings for the purposes of enhancing member benefits and cultivating new members for AOW.

ADMINISTRATIVE:

1. Maintain policies and procedures to ensure financial, legal, and income tax requirements for charitable giving are upheld;
2. Ensure the proper allocation and coding designation of received gifts;
3. Recognize giving donors as appropriate;
4. Ensure best practices in fundraising and tracking are followed;
5. Develop and oversee the Major Gift budget;
6. Ensure the operation of donor benefit and recognition efforts, including recognition events, records, plaques in the museum, etc.;
7. Collaborate with Finance Department to ensure the proper recording of all major and planned gifts and expectancies;
8. Collaborate with the Executive Director of AOW, Finance and the VPIA to ensure periodic reports are provided to the CEO and to the Board regarding the status of major gift development;
9. Make public and private presentations as needed or requested;
10. Promote AOA and its affiliates and its diverse initiatives.

OTHER:

1. Maintain a flexible schedule and works weekends and late nights, as needed;
2. Lead, coordinate, and attend meetings, as needed or requested;
3. Maintain and report statistical data, as needed or requested;
4. Drive personal vehicle for business purposes;
5. Utilize MS-Word, Excel, PowerPoint, and Publisher to generate communications, presentations, and reports;
6. Utilize MS-Outlook for email communications and scheduling;
7. Participate in on-call responsibilities for emergency response.

Signature

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