



## MAJOR & PLANNED GIVING OFFICER POSITION DESCRIPTION

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<b>EFFECTIVE DATE:</b>	<b><u>04/15/2022</u></b>	<b>REPORTS TO:</b>	<b><u>VPIA</u></b>
<b>DIVISION:</b>	<b><u>Institutional Advancement</u></b>	<b>SUPERVISES:</b>	<b><u>N/A</u></b>
<b>DEPARTMENT:</b>	<b><u>Development</u></b>	<b>DRIVING CLASS:</b>	<b><u>Required</u></b>
<b>FLSA CLASS:</b>	<b><u>Exempt</u></b>	<b>BENEFITS:</b>	<b><u>Eligible</u></b>
<b>FTE STATUS:</b>	<b><u>1.0 (Full-time)</u></b>		

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### GENERAL SUMMARY:

The Major & Planned Giving Officer develops and implements fundraising strategies and activities to carry forward the mission and vision of America's Automotive Trust (AAT) 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. Additionally, the incumbent is responsible for collaborating in the management of the Concours Club program and the AAT Heritage Society member development efforts with particular emphasis on major and planned gift development. The Major & Planned Giving 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 AAT's vision and mission.

The Major & Planned Giving Officer reports to the Vice President for Institutional Advancement (VPIA) and performs a majority of work independently while exercising professionally sound judgment and discretion. Responsibilities include but are not limited to: Major and planned gift cultivation, solicitation and stewardship; Oversight of high-level member relations and membership growth; Promotion of AAT 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 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.

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## **PRIMARY OBJECTIVES:**

1. Build a sustainable Major Gift and Planned Giving Program generating funds to strengthen the financial resources of AAT and its affiliates;
2. Procure long-term, regular financial support for AAT and its member entities through cultivation, solicitation, and stewardship of major and planned giving prospects and ensuring donors and prospects remain informed about the organization's mission, needs, and giving opportunities;
3. Create, execute, and sustain a major and planned giving 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 the Museum's highest donor recognition societies—the Concours Club and AAT Heritage Society, and ensure effective identification, cultivation, and stewarding of donors at these levels.

## **MAJOR RESPONSIBILITIES:**

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. Develop, review, and deliver major and planned giving policies and processes to support the effective identification, cultivation, solicitation, and stewarding of gifts;
3. Plan, implement, and oversee an effective major and planned gift department within the Institutional Advancement Division;
4. Ensure that the ongoing process of major gift prospect review meetings is implemented involving the Advancement and Executive Team, as appropriate;
5. Collaborate with other Advancement and Executive personnel of AAT and its affiliates to provide for an effective major gift development operation;
6. Shepherd prospective benefactors through the major and planned gift processes, inviting the gift, closing the solicitation, thanking, recognizing, and reporting;
7. Establish and maintain a dynamic portfolio of no less than 150 active major and planned gift prospects in all phases of qualification, cultivation, solicitation, and stewardship;
8. Participates in annual Institutional Advancement Department's strategic and operational planning process to provide an effective annual plan for the Major and Planned Gift Department within the Division;
9. Oversee the creation, implementation, and monitoring of the major and planned giving program budget including tracking income and expenditure, authorizing disbursements, financial analyses, and preparing reports;
10. Promote planned giving through direct and electronic mail, museum publications, the planned giving website, seminars, and events;
11. Oversee the planned giving marketing program and website content in collaboration with the Marketing Department and the Web-design firm;
12. Collaborate with Marketing & Communications Department personnel for the promotion of major and planned giving efforts.
13. Maintain Institutional Advancement policies and procedures to ensure financial, legal, and income tax requirements for charitable giving are upheld;
14. Ensure the proper allocation and coding designation of received gifts;

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15. Recognize planned giving donors through our Club Auto Founder, Concours Club, and AAT Heritage Society, as appropriate;
16. Ensure best practices in fundraising and tracking are followed;
17. Develop and oversees the Major Gift and Planned Giving budgets;
18. Ensure the operation of donor benefit and recognition efforts, including recognition events, records, plaques in the museum, etc.;
19. Collaborate with Finance Department to ensure the proper recording of all major and planned gifts and expectancies;
20. Collaborate with Finance and the VPIA to ensure periodic reports are provided to the CEO and to the Board regarding the status of major and planned gift development;
21. Make public and private presentations as needed or requested;
22. Promote AAT and its affiliates and its diverse initiatives.
23. Plan, implement, and oversee all high-level membership development efforts for the AAT Heritage Society and Concours Club donor societies in collaboration with the Advancement and Executive Team.

**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.

**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.

**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 100K 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;

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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;
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 QUALIFICATION:**

1. Demonstrated success in Major Gift fundraising in a large non-profit or university;
2. Experience in planned giving;
3. An innovative and creative approach to major fund development;
4. A familiarity and appreciation for historic and collectible vehicles;
5. An interest and willingness to participate in the activities and events of the auto enthusiast community.

**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.

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