Leadership Gift Officer

JOB DESCRIPTION

FOUNDATION EXPECTATIONS

Employees of Riley Children’s Foundation are expected to take ownership of their job responsibilities, to demonstrate job proficiency, to exhibit professionalism at all times, to continually seek out ways to improve performance, to challenge established processes to achieve the best results, to sustain high standards of productivity and efficiency without sacrificing work quality, to assist and cooperate with coworkers, and to consistently demonstrate commitment to the job and the organization.

Note: This description is intended to illustrate the general content of and requirements for this position. It should not be construed as an exhaustive statement of duties, responsibilities or requirements.

POSITION PURPOSE

Working as part of the Leadership Giving Team and reporting to the Director, Planned Giving, the Leadership Gift Officer will focus primarily on cultivating relationships that result in estate and other planned gift commitments to Riley Children’s Foundation. The Leadership Gift Officer maintains a portfolio of prospects, implements strategies to meet budgeted gift revenue goals, and builds relationships toward gifts of passion through the donor continuum. The Leadership Gift Officer also partners with other fundraising team members and volunteers to secure planned gifts. While the Gift Officer primarily focuses on estate/long-term gifts, donors may also be cultivated for immediate outright support.

Foundation and individual staff goals are set annually and are expected to grow toward the Foundation’s strategic plan and annual business plan.
Mission, Vision & Values

**Mission**
To inspire people to invest in pediatric research, care, and programs that support the physical and mental health of kids.

**Vision**
To ensure all children have equitable access to exceptional healthcare so they may reach their optimal health and quality of life.

**Values**
We aspire to model *inclusion* and treat everyone with dignity and respect.

We strive to grow through thoughtful risk-taking that leads to *innovation*.

We trust one another to act in the best interests of Riley Children’s Foundation, our donors, and the children and families we serve.
The Leadership Gift Officer has annual fundraising goals based on prospects in the officer’s portfolio, future prospect assignments and annual Foundation-wide goals. Performance expectations also include:

- **Fundraising**
  - **Relationship Building:** The Leadership Gift Officer develops authentic relationships with donors in a focused portfolio to help donors define and accomplish their philanthropic goals in alignment with Riley Children’s Foundation organizational priorities. The Officer conducts identification and qualification calls/visits and develops customized cultivation, solicitation and stewardship plans.
  - **Solicitations:** Solicit and guide gifts at the appropriate level for the donor’s intentions to support Riley.
  - **Portfolio:** Build and manage a portfolio of donor prospects capable of including Riley in their long-term philanthropic plans.
  - **Collaboration:** Collaborate with other fundraising staff to create solicitation strategies that include a planned gift component.
  - **Stewardship:** In coordination with the Planned Giving and Donor Engagement teams, contribute to the creation and execution of stewardship/donor engagement activities for 1924 Society members (current planned gift donors), potential planned gift donors, and the Riley professional advisor planned giving volunteer group, the Riley Advisors Council.
  - **Marketing plan:** In coordination with the Director, Planned Giving, and in partnership with the Communications team, contribute to the development and execution of an annual planned giving marketing plan.
  - **Planning Giving Education:** As part of the Planned Giving team, provide educational opportunities on planned giving to Foundation staff and key external audiences.

- **Administrative**
  - **Administrative:** Maintain accountability to administrative systems and procedures including submitting expense reimbursements, credit card reconciliations, invoices, reports, RCF calendar additions, etc., by the deadlines assigned.
  - **Meetings:** Prepare for and actively participate in all Riley Children’s Foundation meetings as appropriate. Ensure expectations and tools for meeting agendas and follow-up are implemented.
  - **Budget:** In coordination with the Vice President, Leadership Giving, develop, manage and monitor the budget, staying within overall budget guidelines.
  - **Technology:** Understand and effectively use the technology available at Riley Children’s Foundation.
  - **Compliance:** Ensure strict compliance with all Foundation policies, as well as local, state and federal laws that govern business practices.

- **Riley Children’s Foundation Representative**
  - **Presentations:** Represent Riley Children’s Foundation through delivering public speeches about the organization and its mission to the external public.
  - **Tours:** Give tours of the hospital, and provide information on Riley Hospital, Riley Children’s Foundation, JWR Museum Home and Wells Center for Pediatric Research as appropriate.

- **Other Duties as Assigned**
  - **Riley Children’s Foundation Events:** Participate in Riley Children’s Foundation events as requested.
  - Other duties as assigned.
EDUCATION AND EXPERIENCE

To perform this job successfully, an individual must have the following education and/or experience.

- **Education**: Bachelor’s degree required.
- **Experience**: Three to five years of progressive fundraising experience or equivalent client-focused environment, with an emphasis on relationship building. High level of knowledge of an overall donor or customer experience model. Understanding of planned gift vehicles and how to engage donors in planned gift conversations and opportunities is a plus, though RCF is willing to train in Planned Giving best practices.
- **Skills**: Solid relationship building. Ability to interact successfully with others, both in person and through phone, e-mail, and written correspondence. Understanding of individual donor needs and perceptions. Strong ability to speak in public. Excellent written communication. Sensitivity to needs of donors. Problem-solving, research and analytical skills. Attention to detail and organization. Proficiency in Microsoft Office products with a key focus on Word, Excel and Outlook; experience with SharePoint is a plus. Proficiency in use of databases.
- **Qualities**: Personal belief in Riley Children’s Foundation vision, mission, core values and strategic direction. Results oriented. Ability to work under pressure and effectively prioritize a varied and diverse workload. Inquisitive and sharp minded. Self-motivating and self-starting. Quiet pride in one’s work. Perseverance. Highly energetic. Optimistic and positive. Team player. Must adhere to the highest ethical standards. Professional demeanor. Must be willing to travel. Occasional weekend and evening work.

WORK REQUIREMENTS

The work requirements described here are representative of those an individual must meet to successfully perform the functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions.

**Physical Demands**

- Ability to work in a fast-paced environment.
- Ability to stand and sit for periods of time and to move intermittently throughout the workday.
- Ability to operate office equipment, including computers, copiers, fax machines and phones.
- Ability to occasionally lift and/or move up to 25 pounds.

**Travel**