

Kerry A. Bartlett, CFRE, MBA
Vice President, Foundation



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Job Title: Major and Planned Giving Officer
Division / Dept: VNA & Hospice Foundation
Reports To: Vice President of Foundation
FLSA Status: Exempt
Approved By/Date: Vice President Human Resources, 06/2017

Job Summary:

As part of an integrated fund development plan, build, implement, strengthen and evaluate a formal major and planned giving program to promote current and deferred major giving by donors, prospects, patients, survivors, volunteers and staff. Work independently with some supervision by the Vice President of the Foundation. Integrate and demonstrate the core values of the VNA in all aspects of work responsibilities.

Essential Job Duties/Responsibilities:

The individual must be able to perform the essential job duties and responsibilities to be effective. Other duties may be assigned as needed.

1. Responsible for identification, cultivation, management and stewardship of all major and planned giving prospects and donors, working in collaboration with Vice President of Foundation and through a volunteer-driven program
2. Solicit and/or coordinate the solicitation of annual operating support, capital and endowment funding and other special projects to generate significant and sustainable growth in annual support, major gift, endowment and legacy programs. Track prospects assigned to other staff and volunteer solicitors
3. Ensure all contact updates and call reports are recorded in Raiser's Edge
4. Create strategic and multi-year fund development, cultivation and stewardship plans to ensure major and planned giving fundraising goals are achieved
5. Develop and implement all stewardship and recognition activities for Nightingale Society members
6. Act as staff liaison for Planned Giving Committee and develop their interest in and understanding of the VNA
7. Develop and maintain relationships with local professional advisors (attorneys, CPAs, trust officers, etc.)
8. Steward all active/pending estates to ensure donors' wishes are followed and appropriate documentation is maintained
9. Develop and coordinate planned giving events/seminars for donors, prospects and advisors
10. Work with Director of Marketing and Communications on annual planned giving marketing plan
11. Provide copy ideas and articles for VNA newsletters and communications as appropriate
12. Assist in the review and evaluation of proposed policies and procedures in the major and planned giving program; make recommendations for improvements as needed

13. Work with Vice President of the Foundation on project budget development and management to achieve program goals
14. Ensure current knowledge on trends and legislation impacting major and planned giving donors and programs.
15. Maintain safe work areas and comply with safety procedures and equipment operating rules
16. Follow VNA safety policies/procedures. Report accidents or unusual incidents immediately to the supervisor and Human Resources
17. Attend required meetings and complete mandatory education by deadline

Skills/Abilities: Initials: Associate _____/ Manager _____

- Communication – formal and informal presentation, verbal and written
- Customer focus –internal and external
- Fundraising experience – techniques, strategies and sources
- Interpersonal skills
- Time management
- Project management
- Microsoft Office Suite and software including Blackbaud Raiser’s Edge related to position

Qualifications:

To perform this job successfully, an individual must have the following:

- Bachelor's degree (B.A.) preferred; three to five years related major and/or planned giving experience and/or training; or equivalent combination of education and experience

Physical Requirements:

To perform the essential duties, the individual must be able to:

Regularly: sit, stand, walk, balance, talk, hear, feel, and touch; reach and grasp with hands/arms; use hand-eye coordination, use vision for close, peripheral, depth and ability to adjust focus

Occasionally: stoop, bend, kneel, crouch and climb; carry/lift up to 50 pounds

Work Environment: Most of time is spent in an office environment; low noise. Frequent local travel within Indian River and/or Brevard County; infrequent in-state and/or out-of-state travel to attend conferences

Associate Statement of Understanding

I have read and understand the job description for my position. I am able to perform all the essential functions of this position.

As an associate, I will strive to uphold the mission and vision of the organization. I understand that I am required to adhere to the VNA core values in all interactions with customers, stake holders and fellow associates.

Associate Signature: _____ Date: _____