



We're Hiring!

Position: **Planned Giving Manager**

Location: Remote

Salary: \$70-85,000

Compassion & Choices is seeking a **Planned Giving Manager** to help advance our work to improve care, expand options and empower everyone to chart their end-of-life journey.

This position is responsible for the oversight and management of the activities and vendors that support the work of the planned giving program.

This is a full-time, remotely-located, paid position reporting to the Senior Director of Legacy & Planned Giving. Compensation offered will be commensurate with experience.

We offer excellent benefits including employer-shared medical and dental insurance premiums, employer-paid short- and long-term disability, life and accidental death & dismemberment insurance, flexible spending account for medical and child care, commuter pre-tax benefit, eligibility to participate in 401K with generous 5% employer match and 100% vested at time of eligibility, 12 paid holidays, 17 PTO days first year, and personal days.

Primarily, the person in this position will be responsible for:

Project and Program Management

- Manage first contact with planned giving prospects for qualification as a legacy donor.
- Serve as the main contact and project manager for all planned giving vendor relationships such as Pentera, Stelter, PG Calc, and FreeWill. Responsibilities include project managing, overseeing, and coordinating with internal stakeholders to ensure on-time delivery of overall external mailings and emails. Projects include but are not limited to Newsletters, Quickcards, Surveys, Donor Inquiries and Responses, Content Preparation, and List Coordination.
- Gather, evaluate and report out metrics on communication and engagement such as Pentera communications and Google Analytics Data for targeted messaging and follow-up.
- Run reports to evaluate and analyze, planned giving prospect pool to identify best prospects for follow up and further cultivation/solicitation to enhance overall giving to the planned giving program
- Maintain collaborative planned giving and major donor process for the creation of a double ask prospect list through an integrated initiative with the major gift officers and planned giving rating system. Coordinate planned giving donor information for MGO Donor Trips.
- Directly work with the Finance/Legal/Compliance Team to appropriately transfer and record estate assets for the Consolidated Financial Statements and Audit.
- Directly work with PG Calc and the Finance Team to ensure that Compassion and Choices are compliant in all states for the registration requirements and reserve requirements for CGAs.
- Directly work with CTAC, our CGA administrator to book all new CGAs and ensure that payments

and tax records are completed correctly.

- Prepare Reports to track planned giving metrics to illustrate program success.
- Draft planned giving content for Eblasts and Newsletters.
- Plan and execute stewardship opportunities for the Legacy Circle Members.
- Communicate with estate representatives, including preparation of requested documents for signatures, tracking and updating planned giving plans related to estates in process, and closing estates at fiscal year-end.

Program Support

- Follow up and communication with estate representatives, family members, and other professionals.
- Manage, update, and research the portfolio of donors and Legacy Circle members for the Director of Legacy and Planned Giving.
- Prepare reports and update databases on all planned gifts commitments.
- Manage and update portfolio of Legacy Circle members and potential Legacy Circle members, including contact notes and status.
- Prepare, track, and support follow-up of all supporter responses.
- Provide research on key prospects.
- Prepare CGA Illustrations for new prospects, CGA packages for signature by new CGA Donors, maintain a CGA prospect list and ensure all documentation is executed and received.
- Organize a planned giving portfolio for appropriate moves management action plan.

Preferred Qualifications (You will be a good fit):

Education and Experience:

- B.A. in Business, Marketing, Communications or Non-Profit Management– or an equivalency of related experience and/or education may be considered.
- Five (5) years' experience in nonprofit development, research, or similar field.

Skills:

- Excellent oral and written communication
- Ability to work independently and as part of a team
- High level attention to detail; ability to meet all deadlines.
- Ability to read and write research profile, reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization. Ability to write complex donor background reports that include various source information in a style that is easy to read and understand.
- Mathematical Skills: Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio and percent and to draw and interpret bar graphs.
- Reasoning Ability: Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.
- Computer Skills: Understanding of donor database/CRM systems including complex query and report building, coding, gift structures (hard and soft credits, source codes, and general ledgers),

logic and workflows, and other basic functionality is necessary. Specific experience of EveryAction would be helpful but is not required.

How to Apply:

Email current resume and cover letter as one PDF document to jobs@CompassionAndChoices.org. In the subject line of your email, indicate "Last_First Name, PGM 11-2021". In your cover letter, please (1) indicate how your personal philosophy aligns with our mission, (2) provide a brief summary of your directly related experience, and (3) provide your salary expectation (with a specific amount/range vs 'negotiable').

Questions about the position may be directed to jobs@compassionandchoices.org.

About Compassion & Choices

Across the nation, Compassion & Choices works to create a society that affirms life and accepts the inevitability of death, embraces expanded options for compassionate dying, and empowers everyone to choose end-of-life care that reflects their values, priorities and beliefs. To make this vision a reality, we improve care, expand options and empower everyone to chart their end-of-life journey.

Compassion & Choices is committed to building a staff that reflects the diverse communities that make up our country. We are an Equal Opportunity Employer and recruit, hire, train, promote, and administer any and all personnel actions without regard to age, color, creed, disability, economic status, ethnic identity, gender identity, national origin race, religion, sex, sexual orientation, veterans status, or any other basis prohibited by applicable law.

Link to Job Description: <https://compassionandchoices.org/about-us/employment>