

## DIRECTOR OF GIFT PLANNING POSITION GUIDE

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### ABOUT SAINT MARY'S COLLEGE [www.saintmarys.edu](http://www.saintmarys.edu)

Saint Mary's College is a four-year, Catholic, women's liberal arts college that is located in Notre Dame, Indiana just north of the city of South Bend. Founded in 1844 by the Sisters of the Holy Cross, it sits across the street from the University of Notre Dame and includes 100 acres of trees, gardens, historic buildings, and technologically advanced classrooms beside the Saint Joseph River.

Saint Mary's mission statement reads, "A pioneer in the education of women, the College is an academic community where women develop their talents and prepare to make a difference in the world... Saint Mary's promotes a life of intellectual vigor, aesthetic appreciation, religious sensibility, and social responsibility. All members of the College remain faithful to this mission and continually assess their response to the complex needs and challenges of the contemporary world." Learn more about the College's [mission and core values of Learning, Community, Faith/Spirituality, and Justice](#).

Frequently ranked among the top 100 Best National Liberal Arts Colleges by U.S. News & World Report, Saint Mary's distinguishes itself through its status as a preeminent women's college and its focus on Catholic education. A Saint Mary's education offers students six nationally accredited programs, more than 30 majors, and preparation for today's professional expectations with an emphasis on personal responsibility for social justice. The College enrolls approximately 1,600 students from nearly all U.S. states and ten countries – with 93% of graduates earning their degree on-time and within four years. Saint Mary's also offers graduate programs for men and women in the areas of autism studies, data science, speech language pathology, and nursing practice. In 2016, [Jan Cervelli](#) was formally installed as the 12<sup>th</sup> President of St. Mary's College.



In 2014, Saint Mary's College completed their six-year [Faith Always, Action Now](#) comprehensive campaign – the largest in the institution's history – at \$105 million (\$25 million above its initial goal). Since the campaign's completion the College has continued to build out its \$177 million endowment, purchased 41 acres of new, undeveloped land, and begun preparation for the institution's next strategic plan. This plan is set to be approved by Board members in summer 2018, and will drive the institution's fundraising priorities as the College moves towards a new set of exciting opportunities.

## DIRECTOR OF GIFT PLANNING

The Director of Gift Planning is responsible for developing and implementing a long term program that will substantially enhance philanthropic giving to Saint Mary's College. The Director will be responsible for all aspects of planned giving including communication, administration, prospect identification, cultivation, solicitation, and stewardship programs and activities. Collaboration with the development team in strategic planning is essential while working closely with the Executive Director of Development and the Vice President for College Relations. This individual reports directly to the Executive Director of Development.

## RESPONSIBILITIES

- Develop and manage a comprehensive gift planning program that includes prospect visits, relationship management, and the education of all major gift staff, College Boards, and councils on gift planning basics.
- Manage all aspects and details of pending and completed planned gifts among the donor, the donor's advisors, the Business Office, the President's Office and the College's legal counsel.
- Serve as the primary representative for members of Mother Pauline Society – the College's gift planning society.
- Meet annual goal of visits with 8-10 donors per month
- Establish and meet annual fundraising goals.
- Identify, visit, solicit, and steward a portfolio of 75-100 prospects.
- Develop tailored gift planning mailings, newsletters, and emails to select audiences.
- Work closely with clerical staff.
- Prepare quarterly and annual progress reports.
- Manage the gift planning budget.



## QUALIFICATIONS

The following qualifications are desired for the Director of Gift Planning:

- A minimum of five to ten years of development experience, preferably in planned or major giving at a higher education or community-based nonprofit.
- A strong commitment to the mission of Saint Mary's and a passion for all-women's education
- A superior knowledge of charitable trusts, gift annuities, bequests, and other planned gifts.
- Demonstrated record of strong strategic planning and effective relationship-building.
- Demonstrated experience managing a portfolio of donors successfully.
- Exceptional analytical skills and legal knowledge.

- An understanding of relevant tax laws and planned giving vehicles.
- Ability and drive to stay up-to-date on any changes or emerging trends in the planned giving field.
- Excellent written and oral communication skills with the ability to deliver compelling and persuasive presentations, as well as superior interpersonal and organizational skills.
- A collaborative, diplomatic approach to teamwork, and a self-motivated, innovative, and persistent work ethic.
- Familiarity with specialized gift planning software preferred; experience in comprehensive campaigns is a plus.
- The ability to travel and a bachelor's degree from an accredited college or university is required.

## APPLICATION

To be considered for this opportunity, please send a letter of interest and resume to:

**Joey Scheiber**

Associate Consultant, Executive Search

[joey.scheiber@campbellcompany.com](mailto:joey.scheiber@campbellcompany.com)

Phone: (312) 896-8897



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*Saint Mary's College, founded and sponsored by the Sisters of the Holy Cross, an order of the Roman Catholic Church, was chartered as an institution for women as a Catholic witness in higher education. It has continued to adhere to that focus and mission. As a Catholic institution, the College reaffirms its mission and philosophy which call for a modeling of social justice and Christian principles in our personnel policies and practices.*

*All College policies, practices, and procedures are administered in a manner consistent with our Catholic identity. With the foregoing understanding, Saint Mary's College will not engage in discrimination based on sex, race, color, national origin, religion (except where religion is a bona fide occupational qualification), age, disability, citizenship status, genetic information, veteran status, or any other characteristic protected by law. Based on our Catholic values, the College also prohibits discrimination based on sexual or political orientation.*

*In the areas of undergraduate admission, academic year housing, and varsity athletics, Saint Mary's College will remain exclusive in respect to sex, but not as to any of the other above-mentioned characteristics.*