



POSITION DESCRIPTION

<i>Title:</i> Planned Giving Officer	<i>Employment Status:</i> Full Time, At-Will
<i>Department:</i> Strategic Partnerships	<i>FLSA Status:</i> Non-Exempt
<i>Reports to:</i> Chief Strategy Officer	<i>Supervises:</i> Interns & Volunteers

MISSION:

Seeking to put God’s love into action, Pikes Peak Habitat for Humanity brings people together to build homes, communities and hope.

GENERAL DESCRIPTION:

Working under the supervision of the Chief Strategy Officer (CSO), with assistance from the Donor Relations Manager (DRM), the Planned Giving Officer (PGO) is responsible for the design, implementation, and strategic growth of the **Planned Giving (PG) Program**. The PG Program seeks to engage donors, volunteers, and other supporters to motivate their desire to accomplish a philanthropic goal that will benefit people/others while creating lasting improvements in the future.

Managing strategic and day-to-day responsibilities of stewardship of the current planned giving portfolio (including existing donors), the PGO will coordinate with the DRM as appropriate. The PGO will utilize Pikes Peak Habitat’s CRM (Customer Relationship Management) software to track, cultivate and steward donors and prospective donors. This person will also act as the staff liaison to the planned giving committee to support and help guide the direction of the PG Program. As necessary, the PGO will recruit and supervise interns and volunteers to help with PG Program efforts.

The PGO is responsible for keeping up to date on industry standards and best practices. Paramount to this position is the ability to work with a high degree of independence, juggling various projects at once, while maintaining a clear view of how each project supports the organization’s mission. Confidentiality and professional discretion among donors (current and potential) and Pikes Peak Habitat staff are a must.

CORE RESPONSIBILITIES:

- Develop a strong understanding of Pikes Peak Habitat’s programs, culture, and voice when representing the organization to the public as well as in donor conversations.
- With the guidance of the CSO and DRM, develop a three-year planned giving strategy to include an annual plan to grow the PG Program. In the first three years, the PGO should, at a minimum:
 - Host educational seminars with panelists intended for donors, financial advisors, etc. to learn about planned giving with Pikes Peak Habitat
 - Working with the Communications Manager, develop a communications strategy that includes digital and print marketing materials
 - Create a planned giving society and work towards the creation of a signature event
 - In collaboration with the CSO, advise in the creation of the PG committee. Once established, the PGO will serve as the staff liaison to the PG committee with input as to recruiting potential committee members.
 - Create and maintain a portfolio of planned gift relationships, and increase portfolio by generating three to five prospect contacts/visits per month in the first year

- Strategize ways to build relationships with donors. Examples of this may include, but are not limited to:
 - Volunteer opportunities locally, nationally, or abroad through our Global Village program (with input from our Volunteer Manager and/or Faith in Action Program Manager).
 - Invitations to ground blessings and home dedications
 - Pikes Peak Habitat homeowner meet and greets
 - Personalized PG proposals that illustrate aligned benefit for the donor and Pikes Peak Habitat's mission
- Track, cultivate and solicit new PG prospects, including existing donors and peer relationships, to identify opportunities to expand philanthropic growth.
- Develop and maintain relationships with professional advisors and community foundations as key referral sources and partners for planned giving and other opportunities, such as Donor Advised Funds (DAFs). Serve as a point of contact for advisors seeking information on behalf of clients
- Meet with donors to create, review and update current charitable plans, providing drafting and editing support to properly reflect donor wishes and legacy goals.
- Utilize Pikes Peak Habitat's CRM (Customer Relationship Management) database and additional wealth screening resources (to be determined) to maintain PG portfolio. If not proficient at the time of hire, grow to become comfortable working with the database.
- In coordination with Donor Relations and Finance teams, ensure that appropriate and timely documentation of donors' wishes is maintained and best practices in record keeping are implemented
- Represent Pikes Peak Habitat in the community and in targeted efforts including networking, speaking engagements, conferences and nonprofit presentations to speak about planned giving and the resources Pikes Peak Habitat can provide in this space
- Take initiative in scheduling professional development and other educational opportunities, to ensure up to date knowledge on current tax laws and planned giving trends.
- Assist with strategic partnership's functions such as annual campaigns, events, committee meetings and volunteer activities as needed or required.

KNOWLEDGE, SKILLS, ABILITIES:

- Excellent written and oral communication skills including being an articulate speaker who is comfortable with one-on-one and public speaking engagements
- Excellent interpersonal skills to establish, build, and maintain effective working relationships with individuals from diverse backgrounds
- Respectful of individuals from a variety of cultural and religious backgrounds and able to treat their beliefs with dignity
- Exceptional organizational, problem-solving, and time management skills as well as attention to detail.
- Experience with creating realistic three-year plans and supporting strategies / tactics
- Self-motivated, able to work independently with limited supervision, willing to handle concurrent tasks and make appropriate judgments and decisions
- Understanding of private philanthropy as it relates to not-for-profit organizations and knowledge of fundamental disciplines of resource development
- Ability to ensure that volunteer and donor appreciation is an essential component of our everyday work
- Ability to supervise interns, volunteers, and committee members as needed
- Ability to maintain a high level of confidentiality
- Performs as a team player and comfortable in an ecumenical environment
- Flexibility to work longer hours, evenings, and weekends as needed on an occasional basis

EDUCATION, EXPERIENCE:

Preferred:

- BA/BS degree or equivalent combination of education and experience

- At least two to three years of development or program / volunteer management experience in a not-for-profit environment with working with relationship management software a plus (Bloomerang preferred)
- Experience with formulating budgets and tracking program finances
- Experience planning community-wide events
- Passion and calling to engage donors in Pikes Peak Habitat's mission
- Experience working with committees and volunteers (including knowledge of committee development and volunteer recruitment / mobilization strategies)
- Experience working cross-culturally or with individuals of diverse backgrounds/beliefs/life experiences

Required:

- Reliable transportation, a valid driver's license, current auto insurance and a good driving record
- Proficient in Microsoft Office, including Word, Excel and PowerPoint
- Exceptional attention to detail
- Must pass a background check

ACCOUNTABILITY:

The PGO applicant/team member shall be:

- In agreement with the job description
- In agreement with the policies and ethical guidelines of Pikes Peak Habitat, the Association of Fundraising Professionals and the Donor Bill of Rights
- Accountable to the CSO with an additional line of supervision from the DRM
- And perform other projects and tasks as may be assigned

EQUAL EMPLOYMENT OPPORTUNITY:

Our commitment to Equity, Diversity, and Inclusion in the Workplace: Pikes Peak Habitat for Humanity is an equal opportunity employer. Candidates from diverse backgrounds are encouraged to apply and are considered for employment on merit alone without regard to race (including characteristics associated with race such as hair texture, hair type, and protective hairstyles), color, religion, sex, sexual orientation, gender identity, transgender status, national origin, disability, pregnancy, age (40 or older), genetic information (including family medical history), marital status, military status, lawful conduct outside of work, membership or non-membership in a labor organization, or status in any other group protected by federal, state or local law.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, or crouch; talk or hear; taste or smell. The employee must occasionally lift and/or move up to 40 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT:

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Individuals in this position will generally work indoors, and will have a workspace designated solely for him/her. Necessary office furnishings, equipment and supplies will be provided by Pikes Peak Habitat.

While performing the duties of this job, the employee may periodically be required to work outdoors and would be exposed to weather conditions prevalent at the time. The employee may periodically be required to work in an offsite environment or at special events, and from time-to-time may be asked to travel on Pikes Peak Habitat business, at the affiliate's expense. The noise level in the work environment is usually moderate.

JOB STATUS:

- 1) FLSA Classification: This position is non-exempt according to guidelines of the Fair Labor Standards Act and, as such, an individual in this position is eligible to receive overtime pay.
- 2) Full- or Part-Time: This position is full-time in nature. An individual in this position will regularly work a schedule consisting of 40 hours per week.
- 3) Work Location: The nature and responsibilities of this position are such that the position is designated as a remote-friendly position, such as occasionally working from home or telecommuting; however, the prime work location is the Pikes Peak Habitat business office.
- 4) Schedule: For Pikes Peak Habitat, the usual business days are Monday through Friday, holidays excepted, and usual business hours are from 8:30 A.M. to 5:00 P.M. Mountain Time Zone. The nature and responsibilities of this position are such that the position is not eligible for flexible work scheduling, such as 4-day workweek or alternate start/end times, on a consistent or recurring basis.

COMPENSATION AND BENEFITS:

- The hiring range for this position is projected to be \$20.00 to \$24.00, depending on experience.
 - All full-time Pikes Peak Habitat for Humanity employees are eligible for the following employee benefits:
 - Medical/Life/Dental/Vision Insurance/401(k) Retirement Program with employer match up to 4%/Accrued Vacation and Sick hours/Paid holidays.
- (Short term disability is available, through the Colorado FAML I program)

APPLICATION TIMELINE & INSTRUCTIONS:

- Position will remain open until filled
- Apply on our website at pikespeakhabitat.org/employment
- Upload C.V./Resume
- Upload cover letter explaining how you meet/exceed the position's preferred levels of education and experience contained within this job description
- **NO PHONE CALLS, EMAILS OR PERSONAL INQUIRIES**

ABOUT PIKES PEAK HABITAT FOR HUMANITY:

Habitat for Humanity, founded in 1976, is a global, Christian-based nonprofit organization that grew out of an intentionally multi-racial community in rural Georgia. Locally, Pikes Peak Habitat for Humanity was established in 1986. Seeking to put God's love into action, Pikes Peak Habitat brings together people of all faiths and people of no faith to build homes, communities, and hope. Working alongside each other, we help families and individuals build and improve places to call home and achieve the strength, stability, and self-reliance they need to build better lives for themselves. Pikes Peak Habitat seeks individuals who have a willingness to affirm these principles and values.

At Pikes Peak Habitat for Humanity, we embrace a history rooted in creating equity and take our mission seriously by courageously committing to a culture and workplace where all staff feel safe, welcome, visible, respected, supported, and valued. As an equal opportunity employer, we realize that our success depends upon building an inclusive workforce of diverse perspectives and encourage people of varied races (which is inclusive of traits historically associated with race, including, but not limited to, protective hairstyles and hair texture), ethnicities, national origins, tribes, religions, ages, gender identities and expressions, genders, sexual orientations, marital statuses, disabilities, veteran/reserve national guard statuses, socio-economic statuses, thinking and communication styles to work with us.

We also require that all staff take seriously their ethical responsibilities to safeguarding our intended beneficiaries, their communities (especially children), and all those with whom we work. In line with the prevention of sexual exploitation and abuse, all staff must pass a thorough background screening and will be held accountable for upholding our policies around ethical behavior, including safeguarding and whistleblowing.