



**GIFT PLANNING ASSISTANT
JOB DESCRIPTION SUMMARY
REPORTS TO: DIRECTOR OF GIFT PLANNING
JUNE 2017**

I. BASIC PURPOSE OR FUNCTION OF THE POSITION:

This position is responsible for providing administrative support to the League's growing Gift Planning program. Under the supervision of the Director of Gift Planning, the Assistant is responsible for the administration of all matured planned gifts and current life income gifts. The Assistant also supports Gift Planning portfolio management, events and marketing efforts to identify, cultivate, and steward legacy donors and prospects.

II. ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Provide administrative support to the Director of Gift Planning, including budget preparation, expense reporting, invoice/contract routing and processing, travel and meeting coordination, proactive calendar management, Raiser's Edge (donor database) data input and report generation, and file organization and optimization.
- Manage Gift Planning program lists: update Excel spreadsheets, track and report on all open estates and related documentation.
- Maintain Gift Planning prospect portfolio information in Raiser's Edge database; analyze data and conduct prospect research (via the database and online) to support portfolio management processes such as list segmentation, lead qualification, and cultivation prioritization.
- Draft all correspondence to estate representatives and facilitate timely and full receipt of estate gifts, under the oversight of the Director of Gift Planning.
- Coordinate with the Donor Stewardship Manager to fulfill aspects of estate grove dedications
- Monitor visitor traffic to our gift planning website; using set criteria, import prospects for inclusion in cultivation plan from MarketSmart online database.
- In coordination with Donor Stewardship Manager, support Redwood Legacy Circle events such as luncheons, donor hikes and picnics.
- Generates correspondence, presentation materials, personal donor proposals, spreadsheets, and other similar materials.
- Other general and miscellaneous duties and special projects as assigned.

III. QUALIFICATIONS:

- Bachelor's degree or comparable experience
- Minimum one year administrative support experience required
- Nonprofit development experience preferred
- Strong sense of initiative
- Excellent organizational and project management skills
- Ability to establish and monitor priorities and meet deadlines

- Demonstrated ability to multi-task and work successfully in a fast-paced environment with minimal supervision
- Excellent verbal, written and interpersonal communications skills
- Ability to work independently as well as on a team
- Excellent Microsoft Office skills, including Word, Excel, Outlook, PowerPoint
- Experience with Raiser's Edge or similar fundraising database software
- Strong commitment to the mission of Save the Redwoods League

IV. SUPERVISORY RESPONSIBILITIES:

- None

V. WORKING CONDITIONS/PHYSICAL EFFORT:

- Occasional weekend and evening responsibilities.
- Regularly sits at a desk or computer workstation.
- Frequently moves about the office to collaborate with colleagues.
- Occasionally required to hike through forest land while working off-site including walking on uneven ground, climbing over obstacles, and accessing remote locations.
- Occasionally lifts, carries or otherwise moves and positions objects weighing up to 30 pounds.