



**BOYS & GIRLS CLUB  
OF MANHATTAN**

## POSITION DESCRIPTION

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**TITLE:** VISTA Planned Giving Officer  
**REPORTS TO:** Development Coordinator

**PRIMARY FUNCTION:** Identifies, researches, cultivates and supports solicitation of planned gift prospects and donors. Prepares all necessary correspondence, proposals, and reports.

### **KEY ROLES:**

1. Contribute to the overall development goals, strategies and manage the implementation of all activities relating to planned gift campaigns.
2. Research and identify current individual donors for planned gift solicitations. Prepare background reports on donor giving and interest and develops proposals for donor considerations.
3. Research potential planned gift prospects, develops proposals and conducts solicitations of individual donors and/or their attorneys or accountants.
4. Develop and execute marketing plan for all planned giving.
5. Evaluate overall results of planned gift campaign and recommend modifications or new approaches to support successful achievement of development goals.
6. Negotiate terms of planned giving agreements as appropriate with donors and their attorneys. Conduct initial review of completed documents to ensure they comply with Boys & Girls Club of Manhattan standards and are in the agency's best interest, then pass along for approval.
7. Manage record keeping for planned gift donors, assuring effective and operational support functions are in place.
8. Keep current with laws, statutes, planned giving materials and Club literature.
9. Develop strategic alliances with donors, prospects, attorneys, financial advisors, accountants and other with an interest in planned giving opportunities.
10. Communicate information on Boys & Girls Club charitable gifts planning program to professional financial advisors, including attorneys, accountants, bank trust officers, certified financial planners and certified life underwriters.
11. Develops or adapts planned giving materials to support solicitations and increase understanding of planned gifts.

### **RELATIONSHIPS:**

**Internal:** Maintains close, daily contact with Development Coordinator and Executive Director.

**External:** Maintains oral and written contact with external groups, donors, prospects and others for obtaining referrals and help in solving technical issues. Frequent contact with estate planning counsel, financial planners, insurance agents, accountants and law firms to maintain current knowledge in field and to discuss donor interests and appropriate giving methods.

**SKILLS/KNOWLEDGE REQUIRED:**

- Four year degree in related field from an accredited college or university, or equivalent experience.
- Well-developed written and oral communication skills (including editing skills).
- Excellent interpersonal skills and the ability to work well with all types of people.
- Organizational, staff and project management abilities.
- Ability to establish and maintain effective working relationships with Club staff, Board members, volunteers, community groups, and other related agencies.

**FOR MORE INFORMATION, CONTACT:**

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