



## Planned Giving Director Washington, DC



Advancing equity for women and girls through  
advocacy, education, philanthropy, and research



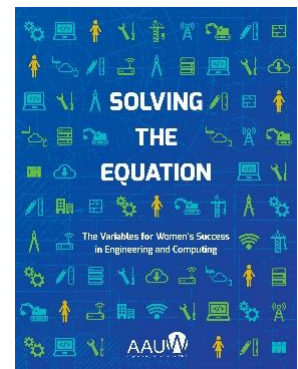
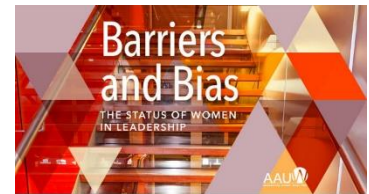
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# AAUW's Mission and Vision

The American Association of University Women (AAUW), a gender equity advocacy organization, is the nation's leading voice promoting equity and education for women and girls and empowering them to reach their highest potential. What began in 1881 as a group of 17 like-minded women has grown into a powerful grassroots network with more than 170,000 members and supporters, 1,000 local branches, and more than 800 college and university partners across the United States.

Across this broad and lively network, AAUW delivers high-impact and widely respected research, advocacy, educational programs, and philanthropy for women and girls:

- ❖ AAUW conducts award-winning research that lays the foundation for advocacy and programming on the most pressing gender equity issues. In 2015, the *Barriers and Bias* report offered a groundbreaking study of the causes of women's continued underrepresentation in leadership roles and initiated a national dialogue about what can be done to change the status quo.
- ❖ Always active in national and state policy, in 2015 AAUW conducted 1,200 Congressional visits to advocate for the Violence Against Women Act, the Paycheck Fairness Act, and other significant national policies.
- ❖ AAUW supports legal cases that seek to enforce civil rights protections and to advance standards for equal pay, harassment-free workplaces, and protection of those who challenge discrimination.
- ❖ AAUW has pioneered programs that help women break entrenched barriers to STEM career paths and to equal pay in any career. In 2015, AAUW delivered more than 350 AAUW Start Smart campus workshops to teach college women how to negotiate their first salary and benefits.
- ❖ AAUW is one of the largest private funders of graduate education for women, awarding nearly \$4M in fellowships and grants each year.



Those who join AAUW belong to a community that breaks through educational and economic barriers so that *all* women and girls have a fair chance. AAUW values and seeks diversity in the world and in its own membership, tolerating no barriers to full participation on the basis of gender, race, creed, age, sexual orientation, national origin, disability, or class.



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# Development at AAUW

The Planned Giving Director will join AAUW’s robust development department, which consists of three branches: membership and annual giving; major and planned giving; and a corporate development program. The planned giving program contributes \$1M to the team’s overall revenue. With strong support from a membership poised to make legacy gifts and with an active planned giving society that attracts extensive volunteer engagement, the Planned Giving Director will find a program with great potential for increased support.



## *Life-Long Members*

Many of AAUW’s 170,000 members are life-long supporters of the association. Having spent their lives at the forefront of some of the 20<sup>th</sup> century’s greatest fights for gender equity, they take pride in the opportunities they have opened for a new generation of women and are deeply committed to preserving AAUW’s ability to confront evolving public policy challenges and to continue transforming a still inequitable political and socio-economic climate. The Planned Giving Director will work closely with members to sustain their legacy of gender equity.

## *The Legacy Circle*

The commitment of AAUW members is reflected in the stature of the Legacy Circle, a 600-member community whose wills designated AAUW as a beneficiary. The Circle boasts an active volunteer base of 8 revolving members, who work with the Planned Giving Director works to engage peers in their regions and to identify and cultivate potential planned donations.

## *A Successful Campaign*

The Director will join AAUW as it closes the exciting 2-year fundraising campaign *Charting the Course*. Supported by a team of dedicated board members and volunteer leadership, the campaign has served as a powerful engine for AAUW’s fundraising program and facilitated a transition from restricted giving to active engagement and unrestricted support that can fund a greater variety of programs.

## *A Collaborative Culture*

Within and outside of the development department, AAUW is a large, varied, and highly collaborative organization, with staff made up of exceptional team players who routinely display respect and professionalism in all internal and external interactions. The Planned Giving Director will be able to build on the organization’s investment in creative fundraising as well as on its continual development of innovative programming opportunities.



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# The Opportunity

The Planned Giving Director will lead and coordinate organization-wide efforts to expand the base of individual donors making planned gifts to AAUW. The Director will be responsible for identifying and pursuing a comprehensive range of planned giving vehicles, ranging from charitable gift annuities to life insurance to bequests. Reporting to the Vice President of Major and Planned Giving and working in collaboration with the full major and planned giving team and with Legacy Circle volunteers, s/he will develop and execute a range of cultivation and stewardship activities, including donor and estate outreach, stewardship and recognition programs, and special events.

## Planned Giving Strategy and Management

- ❖ Create short and long-term plans to develop and implement AAUW’s comprehensive gift planning program, including bequests, charitable gift annuities, trusts, life insurance, stock gifts, charitable lead trusts, and other planned giving vehicles.
- ❖ Recommend planned giving fundraising goals and develop and manage the planned giving budget, ensuring cost-effectiveness of fundraising activities.
- ❖ Manage AAUW’s bequest administration program, including document preparation, gift acknowledgments, and—in collaboration with outside counsel—the administration of disputed gifts.
- ❖ Prepare gift annuity illustrations, letters, and contracts and deliver annuity reports to required states.
- ❖ Ensure that all internal gift recording processes are adequate to support AAUW’s expanding fundraising program.

## Donor Outreach and Stewardship

- ❖ Pursue and maintain strong and lasting relationships with current and prospective Planned Giving donors through regular communication via mail, telephone, email, and occasional personal visits.
- ❖ Analyze prospects’ potential for planned gifts and develop tailored proposals designed to maximize donor engagement and support at all levels.
- ❖ Develop and implement marketing and recognition programs that showcase opportunities for and impact of planned gifts; includes planned giving programs at special events, such as AAUW’s biannual national convention.
- ❖ Serve as the primary staff liaison to Legacy Circle National Chairs, conducting regular communication and monthly calls to deepen engagement and generate new ideas.
- ❖ Engage Directors of Development, the executive team, and other members of AAUW’s staff in the cultivation and solicitation of planned donors.
- ❖ Oversee the production of the Planned Giving newsletter by AAUW’s external vendor.

## Department Coordination

- ❖ Work with the membership and annual giving team and the major and planned giving team to maximize lead generation and cultivation activities.
- ❖ Develop strong and lasting relationships with current and prospective major donors through regular communication via mail, telephone, and email, and occasional personal visits.
- ❖ Coordinate with the major and planned giving team on donor stewardship and recognition efforts.



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# The Candidate

The Planned Giving Director will combine a broad and expert understanding of modern methods of gift planning with experience in all phases of planned donor portfolio management. A donor-centered fundraiser, the Director will enjoy helping people navigate financial instruments and estate law to make a lasting impact on causes that they care about. S/he will be able to work easily with donors at all levels and of all backgrounds in a non-partisan gender equity organization while also coordinating expertly with allied professionals, such as estate planning attorneys and financial planners, to make donations possible. The Director will have a personal commitment to gender equity and will be a compelling ambassador to AAUW members today and as the organization's demographics continue to evolve over the next decade.

## Background

- ❖ 5 years of experience in a successful fundraising role in a national non-profit organization; experience in a membership organization is preferred.

## Knowledge and Accomplishments

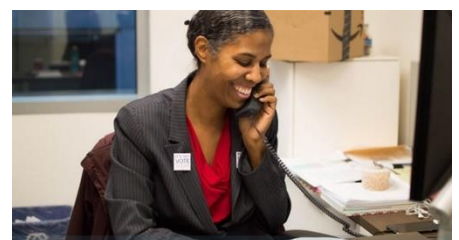
- ❖ Familiarity with all aspects of planned giving, including donor cultivation, giving vehicles, and legal requirements for an organization operating in 50 states.
- ❖ Track record of developing creative proposals that align donor interests with organizational priorities and of securing 5- and 6-figure gifts.
- ❖ Demonstrated commitment to a customer service approach to donor cultivation and stewardship.
- ❖ Ability to collaborate effectively with high-level volunteers and donors.
- ❖ Knowledge of and strict adherence to generally accepted fundraising policies, standards, and values, including the AFP Code of Ethics and expectations of confidentiality.
- ❖ Experience effectively managing projects from end to end, including setting goals, working within budget allocations, and meeting deadlines.
- ❖ High degree of proficiency with computers and computer programs, particularly Microsoft Office and fundraising software such as Crescendo and Raiser's Edge.
- ❖ Bachelor's degree is required; law degree is useful.

## Personal Characteristics and Work Style

- ❖ Strong interpersonal skills, with the ability to set people at ease, build trust, and create lasting relationships.
- ❖ Excellent communication skills and the flexibility to adapt them to a variety of audiences, including donors, families, attorneys, financial advisors, AAUW members, and staff.
- ❖ Ability to take the initiative; to see projects through from end to end; and to meticulously organize, document, and track progress.
- ❖ Ability to travel for donor cultivation and national and state conventions (up to 40% of the time).



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To Apply



## Planned Giving Director

Washington, DC

Questions, résumés, and CVs should be sent to  
[search@driconsulting.com](mailto:search@driconsulting.com)

All first round interviews for this position will take place at Development Resources, *inc.* at 1820 N. Fort Myer Drive, Suite 702, Arlington, VA 22209, (703) 294-6684, or via telephone/video conference.

DRi is an executive search and development consulting firm that places non-profit leaders and works side-by-side with them to develop bold strategic plans, design powerful fundraising programs, and build talented staffs.

AAUW is an Equal Opportunity Employer and is seeking a diverse slate of qualified candidates for formal consideration.



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