

DIRECTOR, HERITAGE LEGACY SOCIETY – HERITAGE FOUNDATION – WASHINGTON, DC

REPORTS TO: DIRECTOR OF DEVELOPMENT

JOB SUMMARY: The Director of the Heritage Legacy Society is responsible for managing, promoting, and expanding the Heritage Legacy Society program by generating deferred gift commitments that will result in additions to Heritage’s endowment now and in future years. The Director of the Heritage Legacy Society directs a team of two and plays a key role in identifying, cultivating, and strategizing about donor advancement in conjunction with the team of solicitors.

JOB DUTIES:

- As a member of the management team, lead the departments overall planning activities, developing specific and measurable department goals that advance Heritage’s vision and mission and complement or support the goals of other departments.
- Establish department priorities, prepare and monitor the department budget, provide overall direction for staff activities, and lead by example. Use department resources effectively to achieve Heritage objectives.
- Enhance the professional and career development of department staff through effective training, mentoring, and performance evaluations. Reward and motivate staff by using bonus and merit increase budgets effectively, and by developing promotion opportunities.
- Recommend department staffing levels, recruit qualified staff to fill approved positions. Prepare job descriptions and advertisements and handle interviews.
- Develop specific and measurable goals for the Heritage Legacy Society program.
- Cultivate donors and solicit planned gifts. Solicitation usually conducted on personal, one-on-one basis. Travel required.
- Work with current and prospective donors in defining their charitable intent – immediate and/or testamentary – and find and/or develop the appropriate funding opportunities at Heritage.
- Maximize the meetings of other solicitors so that Heritage Legacy Society prospects are integrated into travel and solicitation strategies.
- Maintain ongoing, productive relationship with donors, both through personal contact and regular correspondence.
- Manage communications to HLS donors and prospects, through preparation of quarterly newsletter and other marketing materials.
- Train other in-house solicitors how to discuss legacy gifts with donors.

SKILL FACTORS:

Education: BS/BA

Experience: A minimum of seven years professional experience in a gift planning, fundraising, law, or financial planning capacity. At least three years of experience in a non-profit environment with proven

- history of major donor gift solicitation and management of donor relationships.
- Communications: Highly developed communication skills; strong writing skills; ability to effectively communicate Heritage's mission, specific program-related objectives, and technical aspects of various planned gifts. Some marketing experience desirable.
- Management: Key management skills including strategic planning and goal setting, budgeting, staffing, performance counseling, mentoring, and career planning are required

Special Skills/Requirements:

- Knowledge of all of the deferred giving instruments and ability to talk about them. Working knowledge of gift planning software such as PG Calc or Crescendo Pro highly desirable.
- A strong degree of empathy.
- Understand and support the Heritage mission and vision for America, and the department's goals and objectives
- Ability to communicate with donors about their intent.
- Understanding and knowledge about conservative movement.
- Understanding, knowledge, and belief in Heritage's vision, mission, and objectives.
- Ability to travel.

Interested candidates should submit a résumé and cover letter detailing how their experience matches the job requirements and their philosophical interest in the Heritage Foundation's mission to claire@talentmarket.org.