



DIRECTOR OF GIFT PLANNING

SIMMONS UNIVERSITY

Boston, Massachusetts

[Simmons University](https://www.simmons.edu)

Simmons
UNIVERSITY

The Aspen Leadership Group is proud to partner with Simmons University in the search for a Director of Gift Planning.

The Director of Gift Planning will develop, implement, and manage a program designed to enhance philanthropic giving to Simmons University. The Director will be responsible for all aspects of planned giving including communication, administration, prospect identification, cultivation, solicitation, and stewardship programs while serving as an integral member of the team coordinating the John Simmons Society, the university's gift planning society.

Simmons University is a four-year, private, nonprofit, non-sectarian university with a comprehensive liberal arts and professional curriculum.

For more than a century, Simmons has offered a pioneering liberal arts education for women undergraduates integrated with professional work experience. Today, it offers renowned coeducational graduate programs in nursing and health sciences, education, liberal arts, management, social work, public health, and library and information science. It also offers an MBA program designed specifically for women.

Located in the heart of Boston, Simmons University encompasses the many benefits of a small university in the nation's best "college town." Simmons consistently ranks among the nation's top schools in its category in *U.S. News & World Report*, the *Princeton Review*, and *Forbes*.

Decades before women in America gained the right to vote, Boston businessman John Simmons had a revolutionary idea—that women should be able to earn independent livelihoods and lead meaningful lives. It was this same spirit of inclusion and empowerment that produced the first African-American Simmons graduate in 1914, and made Simmons one of the only private colleges that did not impose admission quotas on Jewish students during the first half of the 1900s.

A Simmons education integrates professional preparation, intellectual exploration, and community orientation, because all three approaches are necessary for success. At Simmons, the many dimensions of identity are valued—including race, class, ethnicity, and sexual identity—and that is reflected in the curriculum, affiliated organizations, and community partnerships.

Simmons University is committed to inclusive excellence in all aspects of an individual's community experience. As a university committed to diversity, equity, and inclusion, Simmons encourages applications from all under-represented groups. Simmons is committed to creating, developing, promoting, and enhancing inclusive hiring practices—at all levels, for all positions—ensuring diverse talent pools and the delivery of a consistent positive candidate experience. Simmons is an equal opportunity employer and is committed to continuing to develop a more diverse faculty, staff, student body, and curriculum.

REPORTING RELATIONSHIPS

The Director of Gift Planning will report to the Assistant Vice President, Capital Giving, Cate McLaughlin.

PRINCIPAL OPPORTUNITIES

The Director of Gift Planning role at Simmons is an exciting opportunity for a professional to continue a meaningful career in a growing area within Simmons's Advancement team.

As a member of the Capital Giving team, the Director of Gift Planning will engage prospects in making gifts to support Simmons's funding priorities. Simmons's frontline team is trained to identify and engage the Director of Gift Planning to work with donors, establish bequests, charitable remainder trusts, charitable lead trusts, and gifts of non-traditional assets. The Director is a critical member of the Capital Giving team, helping to create and implement strategies to secure gifts of current and deferred assets. The prospect pool is rich and the Director will be regularly closing new gifts and stewarding realized gifts.

Founded as a women's college in 1899, Simmons University has evolved to become a complex urban university dedicated to innovative teaching and engaged learning in the liberal arts and the professions. In the new structure, Simmons University will continue to offer an undergraduate program for women and numerous graduate programs open to all. Simmons encourages and welcomes candidates from diverse backgrounds and is committed to creating an environment where all voices are appreciated, valued, and respected.

PRIMARY RESPONSIBILITIES

Strategic Planned Giving and Prospect Portfolio Management

The Director of Gift Planning will

- manage a portfolio of prospects within the United States, and move them through the engagement pipeline to closure (key territories include but are not limited to California, Florida, New York, and New England);
- contribute to strategy and direction for trustees, volunteers, senior leadership, and members of the Advancement team;
- develop and implement strategies to move prospects into and through the engagement pipeline;
- secure 8-10 personal visits per month;
- conduct personal solicitations, write proposals, and maintain alumnae/alumni records and prospect data; and
- monitor and report on key performance indicators including performance versus established performance.

Planned Giving Activity, Operations, and Compliance

The Director of Gift Planning will

- develop and implement a strategic plan for planned giving activity;
- strategically plan for growth of the planned giving program;
- deliver informative or training presentations to alumnae/alumni groups, volunteer and board committees, and staff, etc.;
- manage life income gifts and the bequest program;

- create gift proposals, PG Calc illustrations, inquiry packets, and acknowledgment letters, or supervise staff assisting with implementation;
- guide the Major Gifts team and other staff on the process for gift acceptance;
- ensure the highest standard of accountability and compliance with relevant tax laws and accepted accounting principles for gift recognition;
- maintain regular contact with third party advisors—building relationships, promoting awareness of gift planning capabilities, and growing the Simmons brand; and
- manage relationships with charitable gift services and other external service providers for the planned giving program.

Marketing Strategy

The Director of Gift Planning will

- assist in coordinating the design and implementation of a planned giving marketing strategy;
- manage the production of print or electronic collateral, web content, and social networking messages; and
- market planned gift options to class volunteers, reunion classes, alumni boards, and other annual giving or alumni groups.

Donor Relations

The Director of Gift Planning will

- conduct stewardship activities and work with donor relations to implement effective donor stewardship for planned giving donors; and
- oversee all activity related to the John Simmons Society.

KEY COLLEAGUES



Jennifer Rice
Vice President, Advancement

Jennifer joined Simmons in October 2018. She formerly served as Vice President for Development and Alumni Affairs at Wheelock, where for five years she was responsible for fundraising strategy and execution, alumni relations, and advancement communications. Before joining Wheelock, Jennifer was a consultant with The Wayland Group, a regional consulting firm to nonprofit organizations, where she worked with a variety of clients including the Museum of Science, Mass General Hospital for Children, The Boston Children's Museum, Mattapan Community Health Center, Milton Academy, New England Center for Children, Tenacity, Wentworth Institute of Technology, Newbury College, and Thunderbird School of Global Management. Her consulting expertise included feasibility studies, campaign plans, development assessments, and long range-plans.

Early in her career, Jennifer worked at The John F. Kennedy Library Foundation for 10 years where she managed numerous events, grew the national membership base, increased annual program revenue, and ran a successful capital campaign. Originally from New York City, Jennifer attended Bates College and has an MBA in Non-Profit Management from Boston University. She has served on the Board of the Massachusetts Chapter of the Association of Fundraising Professionals as an annual fund volunteer and as fundraising co-chair for her class at Bates.



Cate McLaughlin

Assistant Vice President, Capital Giving

Cate joined Simmons in September 2017. Cate brings with her 12 years of increasing development experience, an MBA with a concentration in Nonprofit Management, and a master's degree in Philanthropic Studies. Most recently, she served as a Director of Development at Tufts University School of Dental Medicine (TUSDM), where she held a variety of roles over her years with that team.

Cate began her career with the United Way of Massachusetts Bay and Merrimack Valley (UWMBMV) as a Development Assistant, from which she established the Donor Relations role and eventually took over the management of their leadership giving society and a frontline fundraising portfolio.

CANDIDATE QUALIFICATIONS AND QUALITIES

Simmons University is seeking a Director of Gift Planning with

- extensive knowledge of the fundamentals of development with knowledge of gift planning strategies, marketing, and/or communications;
- demonstrated success with wealth management, financial planning, tax and charitable gift laws, and planned giving vehicles and methods;
- an ability to model engagement, collaboration, and openness for shared ideas and teamwork;
- familiarity with gift planning marketing and software programs;
- experience working effectively with a range of constituencies in a diverse community;
- experience developing cultivation and solicitation strategies;
- a commitment to diversity, equity, and inclusion and the ability to appreciate multiple points of view; and
- excellent communication skills including the ability to translate technical information and concepts into lay language.

A bachelor's degree is required for this position as is at least five years of progressive development experience including at least one year of related planned giving experience and significant exposure to closing planned gifts.

DIVERSITY, EQUITY, AND INCLUSION

Simmons's values, vision, and mission mandate that it create an environment that is warm, welcoming, and inclusive—a community that appreciates, values, and respects the humanity, dignity, diversity, and contributions of all its members. Simmons's goal is for inclusion and equity to be the thread that runs through all that is done at Simmons. In the world of higher education, this is the foundation known as *inclusive excellence*, a concept that has been communicated and endorsed by the Association of American Colleges and Universities. In other words, Simmons's vision is to make it the most inclusive campus in New England. Learn more [here](#).

SALARY & BENEFITS

Simmons University offers a competitive salary and benefits package. Simmons University is committed to offering its faculty and staff—and those who depend on them—a range of competitive benefits that provide choice and value.

LOCATION

Simmons University lies in the heart of Boston. The campus is surrounded by art, music, history, cultural institutions and the famous Newbury Street. It is steps away from historic Fenway Park, the Isabella Stewart Gardner Museum, the Museum of Fine Arts, and the Longwood Medical Area.

Boston is the largest city in the New England region and has a well-earned reputation as the best "college town" in the U.S., with more than 50 colleges and universities in the Greater Boston area.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please review them for accuracy. Review of applications will begin immediately and will continue until the successful candidate has been selected.

To nominate a candidate, please contact Floyd Akins:

floydakins@aspenleadershipgroup.com.

All inquiries will be held in confidence.