Haverford College
Director of Charitable Gift Planning Position Profile

Executive Search Partner: Triad Academic Search
9/21/22
Haverford College is consistently ranked among the top 20 undergraduate liberal arts colleges in the United States. Located outside Philadelphia, it is highly regarded for its rigorous and intensely personal undergraduate education, which is delivered in a beautiful arboretum setting and anchored in its Honor Code. The vast majority of students live on campus and are active in athletics, student clubs, internships, service activities and self-governance. Haverford was founded by Quakers in 1833, who believed that academic excellence, offered in a setting of tolerance and mutual respect, would serve a larger goal of "educating the whole person." While Haverford is nonsectarian today, those same values continue to inspire and distinguish its students and alumni.
Haverford’s intentionally diverse curricular requirements ensure that students are well-rounded, expansive thinkers. Students take courses in each of three major academic divisions for a variety of ideas, concepts, and intellectual approaches. Featuring 56 individual programs focused on individual growth, Haverford offers specialized majors, minors, and concentrations. 54% of the student population has a minor or a concentration. Additionally, Haverford’s unique four-college exchange program with Bryn Mawr, Swarthmore, and the University of Pennsylvania allows them to retain the strengths of the small college experience, while offering the expanded resources and opportunities usually found at a larger university. Haverford students can take a staggering array of classes at any of these Quaker Consortium schools.

Haverford has chosen to remain small and to foster close student/faculty relationships as a commitment to excellence and a concern for individual growth. 98% of Haverford’s 1,435 students live on campus, the student-to-faculty ratio is 9:1, and they were listed #25 in Forbes’ top liberal arts colleges. Additionally, they have a 92%
graduation rate, and all students complete a senior thesis. Haverford’s faculty is noted for its strength in both scholarship and teaching, and its members expect to transmit to students their enthusiasm and high standards. The faculty members are teaching at an undergraduate college of arts and sciences by choice and they expect to learn, as well as to teach, in this close relationship with undergraduates.

Haverford students and graduates are extremely successful. They are regularly recognized for scholarly achievement through awards and fellowships such as Fulbright, Watson, Guggenheim, and the Nobel Prize. Of Haverford’s students and graduates, 4 are Nobel Prize winners, 85 are Fulbright Scholars, 5 are MacArthur Fellows, 28 are Goldwater Scholars, 69 are Watson Fellows, 20 are Rhodes Scholars, 27 are Guggenheim Scholars, and 6 received the Pulitzer Prize.

Haverford students are admitted to medical school, law school, and other professional schools at rates that are significantly higher than the national average. Recent graduates have gone to programs at the University of Chicago, Duke, Johns Hopkins, Harvard, MIT, UCLA, Cambridge, and the University of Pennsylvania, to name a few. Alumni pursue careers ranging from business and finance (22%), to healthcare (17%), to public service and government (9%), to law and legal services (8%), to science and technology (13%), to education (19%), to communications, leisure, and tourism (7%), and architecture, arts, and museums (5%). Wherever Haverford graduates go, they achieve great things.
In his 1918 book about Haverford College, its then President Isaac Sharpless described its unique standing among higher education institutions: “The purpose is to make the whole Haverford family, managers, alumni, faculty, and undergraduates, a loyal and interested democracy. It is on such a platform that our small college has been standing...and it has no intention of following the well-meant advice of its larger brethren to close its doors or change its general policy.”

A century-plus later, those ideals still hold true and the Haverford educational experience leaves a lasting influence on its graduates. No matter their career paths, no matter their expertise, Haverford alumni are recognizable as sophisticated and compassionate actors and thinkers, who care deeply about the communities they serve and are distinguished by their leadership. Chief among the College’s distinctive features is the high-degree of responsibility and independence that its students are afforded in governing their own activities and as active stakeholders in Haverford’s institutional governance and operations.
The Institutional Advancement Division propels Haverford’s mission and values through inspired engagement and philanthropy. We support the strengthening of the College’s values-based liberal arts education through its relationships with alumni, parents/families and friends, and by building Haverford’s reputation as a remarkable institution of higher learning. Particularly in the case of Haverford alumni, we view their relationships with the College and their fellow alumni as lifelong and strive to enrich them through different engagement and volunteer opportunities.

At Haverford, this is an exciting time. We are in the midst of developing a new strategic plan that will position the College for its next decade and lead up to its 200th anniversary (Haverford was founded in 1833). Expecting to conclude in the next six months, this collaborative community-wide effort will set the institutional aspirations and priorities that will inform our next comprehensive campaign. In tandem with the development of Haverford’s new strategic plan, Institutional Advancement has created a data-informed multi-year and multifaceted plan that undergirds growing the Division, recalibrating several departments, adding new functions, and preparing for a robust campaign. Over the next two years, Institutional Advancement will expand its staffing between 25-40%, across multiple areas (Philanthropy, Alumni and Constituent Engagement, Advancement Operations, and Charitable Gift Planning), and at all levels of its operations, such as Advancement Communications, Volunteer Recruitment and Development, Principal Gifts, and Analytics and Predictive Modeling. We seek enthusiastic, high-caliber professionals to join our existing team of excellent colleagues and help propel Haverford forward through the launch of our comprehensive campaign and fulfillment of Institutional Advancement’s multi-year and multifaceted plan.
Institutional Advancement is being led by Ara Serjoie who has served as Vice President since August 2021. His 28-year career has spanned higher education, youth development, and health care. Ara lived in Tehran, West Berlin, and London before moving to the United States to pursue a bachelor’s degree in liberal arts and sciences from Utah State University. He holds a master’s in public administration from the University of Utah with an emphasis in nonprofit leadership and earned his Ph.D. in higher education leadership and human resource studies at Colorado State University.
Position Overview
Director of Charitable Gift Planning

The Director of Charitable Gift Planning provides energetic operational oversight and enthusiasm for reinvigorating and recalibrating a mature planned giving program at Haverford College with the primary responsibilities of increasing the number and dollar value of planned gifts in the near- and long-term through expert management of a dedicated portfolio of planned gift prospects, robust marketing, consumer-focused responsiveness to inquiries, and strategic and comprehensive collaboration with gift officers and internal and external partners. The Director promotes planned giving opportunities for alumni, parents and friends at all stages of their relationship with the College.

**JOB TITLE:** Director of Charitable Gift Planning

**DEPARTMENT:** Institutional Advancement

**REPORTS TO:** Executive Director of Gift Planning and Principal Gifts

**FLSA STATUS:** HR will determine  Exempt ☐ or Non-exempt ☐

**BENEFITS:** Full-time comprehensive benefit eligible

**LAST REVISED DATE:** 7/18/22

**CUPA BENCHMARK:** HR will provide (low) (mid) (high)
The Director of Charitable Gift Planning manages an active portfolio of 125+ prospects and benefactors, working diligently, creatively and collaboratively to strengthen institutional ties with them through highly personalized and frequent correspondence, conversations and virtual and in-person meetings and a triple ask with a focus on closing an ever-increasing number of new planned gifts at greater total dollar values. In collaboration with the Executive Director of Gift Planning and Principal Gifts, as well as the VPIA, the Director examines, finetunes, reconfigures and enhances a marketing program focused on educating and engaging internal and external constituencies regarding a broad array of planned gift vehicles and runs point on preparing gift illustrations for life-income gifts and contracts for charitable gift annuities. Working collaboratively with the Executive Director of Planned Giving and Principal Gifts and members of the Philanthropy team, as well as the VPIA, the Director helps to model, facilitate and promote the regular closing of planned gifts including working with other front-facing gift officers to do the same. The Director oversees and staffs the Haverford recognition society for donors of planned gifts and bequest intentions and is responsible for ensuring that the College complies with federal and state law as it applies to charitable giving.

In addition to planned giving responsibilities, the Director is expected to discuss annual, multi-year, outright and current use gifts with leadership and major gift prospects and benefactors.
Major Primary Responsibilities

• Active and energetic identification, qualification, cultivation, and solicitation of a portfolio of about 125-150 individuals.

• In partnership with the Executive Director of Gift Planning and Principal Gifts, as well as the VPIA, contribute to the revitalization and recalibration of the planned giving program at Haverford College.

• Partner with the Executive Director of Gift Planning and Principal Gifts to ensure that the College purchases, maintains and upgrades the appropriate software and coordinates the training of planned giving staff in utilization of same.

• Collaboration with colleagues across IA, especially the Philanthropy team, prospect research and management, donor relations and stewardship, and special events.

Essential Functions & Primary Responsibilities

• Actively pursue in-person or virtual visits with assigned prospects for life-income gifts while also being highly attentive to any new outreach by prospects who have requested information about gift planning.
  
  o Make appointments, research donors’ backgrounds, ascertain giving interest and, after visits, follow up internally with campus partners strategically and thoughtfully in a manner consistent with the Donor Engagement Process (DEP) and a lifelong relationship with the College.
The Director will average 15-25 visits per month, and document all conversations of a salient nature (whether prospect is assigned to the Director or not) through the filing of detailed and timely trip reports in RE that outline next steps.

The Director will produce prompt and accurate gift proposals with accompanying gift illustrations in a donor-centric and consumer-friendly manner and, ultimately, gift contracts for contributions to fund charitable gift annuities.

- The Director will optimize gifts of an unrestricted nature for the unrestricted endowment, or of a budget-relieving nature for financial aid, professorships, salaries of administrators and coaches, and other identified priorities of the College.
- The Director will create gift illustrations for other colleagues (such as the Executive Director of Gift Planning and Principal Gifts, VPIA, etc) as requested.

In tandem with the Executive Director of Gift Planning and Principal Gifts, as well as the VPIA, recalibrate and launch an elevated and ambitious Charitable Gift Planning program that entails educational events/programming for prospects and professionals, regular communications and publications in both print and electronic formats, advertising in Haverford College and external publications.

Partner with other front-facing gift officers to educate, advance and secure new life-income, estate and outright gifts.

Collaborate actively with Assistant Director of Donor Relations and Stewardship to ensure prompt and accurate documentation of charitable gift plans (bequests, annuities, trusts) and also to oversee tracking and reporting of the same.
• Monitor, at the direction of the VPIA (and in conjunction with the Controller’s Office), the College’s investment firm’s handling of gift annuities, trusts and pooled funds. Review quality of service, as appropriate, by State Street Global Advisors, the custodial bank or its successor bank. Arrange Annual Review.

• In collaboration with the Executive Director of Gift Planning and Principal Gifts, as well as colleagues in Advancement Communications and Special Events (ACE), the Director will oversee the activities of the Jacob P. Jones Society, the College’s planned gift and bequest society to recognize alumni, parents and friends—including but not limited to imagining and executing the Insider’s Chronicle, Window to the Future, and the annual stewardship Jacob P. Jones Society Luncheon.

• Participate in ongoing education of IA staff and volunteers and encourage them to gain comfort with a triple ask, blended gifts, and the income and tax advantages of life income gifts (charitable gift annuities and trusts) and the ease of giving through beneficiary designations, donor-advised funds and for a particular donor segment a charitable IRA Rollover.

• Contribute actively and saliently to existing marketing efforts for Charitable Gift Planning that are tailored appropriately for specific audiences and which speak to an array of institutional priorities in a donor-centered perspective including specific financial, philanthropic and planning benefits to the donor.

• Participate in a department assessment process to ensure ongoing evaluation and continuous improvement of programs and objectives.
The Director of Charitable Gift Planning reports to the Executive Director of Gift Planning and Principal Gifts.

Education, Training, & Experience

- Bachelor’s degree required; JD desirable
- A minimum of 5 years working in or managing a Charitable Gift Planning program at an educational institution, hospital or comparable not-for-profit entity, or the equivalent professional experience
- Proven success closing planned gifts and the ability and receptivity to closing blended gifts
- Equally acceptable: Experience and demonstrated success in a legal and/or financial institution background, in estate planning and wealth management, with an emphasis on finding and cultivating clients for various life-income and/or wealth planning products.
- A highly organized self-starter who also is detail-oriented and who can thrive in a fast-paced environment with high expectations for consistent excellence in meeting shared goals and mission
• Capacity to work well with high net worth individuals and their advisors; working knowledge of
  o charitable tax law, financial and estate planning techniques
  o A commitment to keeping abreast of relevant tax laws and regulations and to acquire, maintain and enhance a very high level of planned giving technical proficiency
• Familiarity with investment, quantitative financial concepts, and trust accounting
• Superior written and oral communication skills, creativity, and ability to represent the College well in a variety of public venues as well as in writing
• Membership and participation in appropriate professional organizations is necessary to expand expertise and also the planned giving program
• Manage multiple projects and prioritize tasks accordingly, paying special attention to impending
  o deadlines and able to function independently
• Travel required
• Evening and weekend work required
• Skill in dealing with people, diplomacy, tact, discretion, and the ability to maintain confidentiality
• An appreciation for the liberal arts and its potential to develop the fullest expression of individual identity and contribution to community
• Valid U.S. driver’s license required
• Computer literacy, including familiarity with Microsoft Office, Google suite, and Raiser’s Edge or other fundraising database/CRM and willingness to master PGM Anywhere. Experience running gift calculations in PGCalc highly desirable
All faculty and staff (including contract workers) who are employed or engaged by Haverford College, must be fully vaccinated against COVID-19 (to include a booster dose when eligible), and provide proof of vaccination, unless an exemption from this policy has been granted as an accommodation or otherwise.

### Essential or Non-essential Employee

This status determines for the identification, treatment of time, and use of “Essential Personnel” during campus emergencies, including those that dictate suspension of services and/or closure of operations, i.e. inclement weather. During an emergency, Essential Personnel are required to be on campus in order to provide services that relate directly to the health, safety, and welfare of the College, ensure continuity of key operations, and maintain and protect College’s properties.

☐ This is an Essential employee role

☒ This is a Non-essential employee role

### Physical Demands and Environmental Conditions Required of this Position

*Please check the box that appropriately applies to this position for ADA purposes.*

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<tr>
<th>PHYSICAL DEMANDS</th>
<th>NEVER 0 Hours</th>
<th>OCCASSIONALLY Up to 3 Hours</th>
<th>FREQUENTLY 3-6 Hours</th>
<th>CONSTANTLY 6-8 Hours</th>
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<td>Lifting</td>
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To exert strength to move objects from one place to another.

- Sedentary-Lifting 0 to 10 pounds
- Light-Lifting 10 to 20 pounds
- Moderate-Lifting 20 to 50 pounds
- Heavy-Lifting 50 to 100 pounds

Pulling
To exert force upon an object to move or change its direction.

Pushing
To draw an object toward oneself to move or change its direction.

Carrying
To hold objects while moving entire body.

Reaching or working above shoulder
To extend arms upward or outward away from body.

Walking
To move entire body in erect position.

Standing
To maintain body in erect posture in stationary position.

Sitting
To rest weight on buttocks and back of thighs with legs bent at knees.

Crouching/Stooping
To bend upper body forward while fully flexing knees.

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<tr>
<th>Movement</th>
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<td>Kneeling</td>
<td>To maintain upper body in erect position while resting knees on ground.</td>
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<tr>
<td>Climbing</td>
<td>To ascend or descend heights using ladders, scaffolding, stairs, poles, inclined surfaces.</td>
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<tr>
<td>Twisting</td>
<td>To rotate upper body while feet remain stationary.</td>
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<td><em>Driving</em></td>
<td>Operating a motor vehicle, crane, tractor, forklift, etc. Specify__________</td>
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<td>Exposure Limitation</td>
<td>i.e. Cold weather, dust, gas, fumes, etc. Specify________________________</td>
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<td>Other:</td>
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*If driving is a job requirement, please re-confirm that the annual certification/verification of DMV records has been completed.
Haverford College has retained Triad Academic Search to assist in this search. All inquiries, nominations, referrals, and applications should be emailed in confidence to:

Dharshan Jayasinghe
Chief Executive Officer
Triad Academic Search
dharshan@triadacademicsearch.com

For additional information, please visit:

https://www.haverford.edu/  https://triadacademicsearch.com/

Haverford College is an Equal Opportunity/Affirmative Action employer committed to diversity, equity, inclusion, social justice, and providing equal opportunities and access to all individuals regardless of race, ethnicity, religion, gender identity, sexual orientation, national origin or ancestry, age, marital status, disability, or veteran status. Women, non-binary and transgender individuals, people of color, Indigenous people, and those with other or multiple historically marginalized and/or underrepresented identities are especially encouraged to apply. Haverford College and our consortial partners are located on Lenape lands.