



**POSITION SPECIFICATION - DECEMBER 2011**

**POSITION** Director of Planned Giving

**ORGANIZATION** The Cooper Union for the Advancement of Science and Art  
<http://cooper.edu/>

**LOCATION** New York, NY

**REPORTING RELATIONSHIP** Reports to the Vice President for Development

**ABOUT THE ORGANIZATION:**

The Cooper Union for the Advancement of Science and Art is an all honors college dedicated to providing its students with an unparalleled education in art, architecture and engineering. Founded in 1859 by inventor, industrialist and philanthropist Peter Cooper, it is consistently ranked among the finest and most selective institutions of higher learning in the world. With an annual enrollment of approximately 1,000 students, The Cooper Union offers undergraduate and graduate degrees across three academic programs in The Irwin S. Chanin School of Architecture, The School of Art, and The Albert Nerken School of Engineering.

The Cooper Union's mission is to prepare gifted students to make enlightened contributions to the cultural and scientific life of great urban centers. The college's alumni have achieved national prominence, receiving numerous awards for their work including Guggenheim Fellowships, MacArthur Fellowships and a Nobel Prize in Physics.

The Cooper Union recently completed a successful campaign, raising over \$155 million for The Cooper Union, including a new building, 41 Cooper Square, a technologically

advanced academic facility completed in 2009. Designed by Pritzker Prize-winning architect Thom Mayne of Morphosis, the nine-story, 175,000 square-foot, full-block building replaced more than 40 percent of the academic space at the college with reconfigurable, state-of-the-art classrooms, laboratories, studios and public spaces.

The recent construction of 41 Cooper Square and the renovation of the college's Foundation Building have been the linchpins of The Cooper Union's strategic plan to assure academic excellence well into the 21st century. Under the inspired leadership of Cooper's newly appointed President, Jamshed Bharucha, the college is establishing a new financial model for the years ahead. A reinvigorated development effort will be a key component of this effort.

**POSITION SUMMARY:**

The Director of Planned Giving is responsible for developing and implementing a comprehensive gift planning program to annually secure \$2.5M+ in planned gifts related to the needs and priorities of the College.

Reporting directly to, and working closely with, the Vice President for Development, the Director of Planned Giving will play a major role in the College's revitalized fundraising activities.

Key responsibilities include:

***Strategic Planning***

- Work to develop a centralized gift planning program to include the range of gift planning vehicles, including wills and bequests, charitable gift annuities, and charitable remainder trusts to highlight a few.
- Analyze creatively The Cooper Union's needs in order to position them in meaningful ways to attract donors.

***Fundraising***

- Manage a personal portfolio of approximately 250 planned gift prospects. Develop strategies to involve and encourage interest in planned gifting options. Steward existing donor prospects through visits and other high-level interactions and cultivation initiatives.
- Research and develop strategies for identification of new planned giving prospects. Develop solicitation and cultivation strategies and proposals for new individual prospects.
- Solicit planned gifts, in conjunction with key volunteer leadership where appropriate.

- Develop and implement a series of high-level planned giving donor cultivation events, as appropriate.

### *Marketing*

- Plan and manage a comprehensive marketing program for the College's planned gift program.
- Develop and implement a strategic plan to increase awareness of planned giving opportunities for alumni, parents and friends of The Cooper Union.
- Build relationships with deans, faculty and staff to acquire the information needed to solicit gifts and build donor relationships effectively.
- Create marketing materials and communications to encourage planned giving. Develop outreach programs to estate planning professionals in the region.

### *Internal Management*

- Direct and manage the Planned Giving program, oversee an annual operating plan, coordinate technical documentation with Business Office and service providers (banks, trust companies, etc.), and any additional reporting.
- Develop accurate recording and tracking of gifts and stewardship plans for donors. Manage and update portfolio through Advance database, and prepare reports for the Development Committee of the Board, as appropriate.

### **QUALIFICATIONS AND EXPERIENCE:**

The successful candidate will be a seasoned development professional with a track record of success in planned giving. The new Director must be a self-starter, strategic thinker and strong relationship builder, with the technical know-how and ability to create and drive a comprehensive planned giving program.

### **Key Professional Experience:**

- Significant experience in planned giving with a track record of fundraising success; higher education experience is a plus;
- Knowledge of gift planning vehicles, marketing techniques and relevant financial and legal technical issues;
- Broad knowledge of fundraising principles and techniques, including experience promoting and managing cultivation, solicitation and stewardship programs; and
- Exceptional relationship builder, with strong communication and presentation skills.

**Key Personal Attributes:**

- Genuine interest and enthusiasm for the mission and activities of the College;
- Highly collaborative with a demonstrated ability to work with colleagues, the administration, alumni, other constituents and the public;
- Exemplary leadership skills and the ability to exercise sound judgment, adhering to the highest professional and ethical standards; and
- Proactive, sophisticated and diplomatic with the executive presence and personal style to represent the College to multiple internal and external constituents.

**EDUCATION:**

Bachelor's degree; advanced degree a plus.

**COMPENSATION & BENEFITS:**

Salary is competitive, commensurate with experience, and includes a competitive benefits package (<http://cooper.edu/work/benefits>).

*The Cooper Union for the Advancement of Science and Art is an Equal Opportunity Employer.*

**Please email cover letter and resume in confidence to:**

Josie Sandler, [josie@sandlerassociates.org](mailto:josie@sandlerassociates.org)

Jennifer Sussman Brick, [jennifer@sandlerassociates.org](mailto:jennifer@sandlerassociates.org)

Sandler Search Associates

880 Third Avenue, 16<sup>th</sup> Floor

New York, NY 10022

Web site: [www.sandlerassociates.org](http://www.sandlerassociates.org)