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EMPLOYMENT LISTING

Major Gift and Planned Giving Officer

Elsah, IL

Summary: Principia is seeking a dynamic and motivated Major Gift and Planned Giving Officer to support Principia's fundraising program. In this role, you will be responsible for fully developing and overseeing the planned giving operation, while also actively developing and producing gifts from a portfolio of major gift donors. Your role encompasses engaging in personal visits with donor prospects, preparing gift proposals, and strategically marketing planned giving programs. You work closely with donors and their legal and financial advisors, ensuring a seamless process. You oversee the 1898 Legacy Society and coordinate prospect relationships with the Development staff. You will manage and develop a qualified portfolio of donors, foundations, and corporations capable of giving five to six-figure gifts, travelling regularly as you build relationships with Principia's broad global network. As part of a team of philanthropic advisors, you are key to realizing Principia's vision by matching philanthropic goals of alumni and supporters with the organization's funding priorities. You may be a great fit if you are a proven fundraiser, strategic thinker, highly effective communicator, and skilled relationship builder. A successful officer is a results-oriented self-starter with a record of securing five and six figure gifts through well-designed and implemented strategies.

Who We Are

At our award-winning pre-K–12 school in St. Louis, Missouri, and top-ranked Principia College in Elsah, Illinois, Principia faculty and staff make up a close-knit community of educators, coaches, and professionals taking a distinct approach to education—blending academic excellence with Christian Science-based character education. Principia's team of over 500 employees supports not only Principia School and Principia College, but also a worldwide network of Alumni & Friends.

Principia employees are part of an engaging academic community preparing students to be tomorrow's leaders, thinkers, and changemakers. We strive to create a [collaborative and inclusive environment](#) where everyone feels they belong and are valued.

Primary Responsibilities

- Cultivate relationships, track major gifts, and collaborate for philanthropic success at Principia.
 - Foster meaningful connections and partnerships with individuals and organizations, resulting in substantial philanthropic contributions to Principia through in-person meetings across the country, email interactions, and phone conversations with prospective donors and existing supporters.
 - Appropriately track major gift activity in CRM as related to activity, solicitations and proposals, revenue, and reporting requirements; ensure timely and accurate data entry ahead of required quarterly performance and KPI (key performance indicators) reports
 - Serve as technical reference on complex gifts (real property, oil/gas/mineral rights, closely held stock) and legal/tax ramifications, consulting with Principia's Legal and outside counsels as necessary.
 - Collaborates with Advancement staff to ensure prospects are appropriately engaged, solicited, and stewarded
- Develop and oversee Principia's planned giving program:
 - Understand concepts of estate planning and charitable giving in relation to planned gifts, including associated federal and state laws and be able to convey this technical information simply and understandably to donors and colleagues. Promote and educate donors on planned giving options, working with donors and their legal and financial advisors.
 - Collaborate with development team on prospect relationships, creating proposals, and stewardship.
 - Manage Principia's relationship with charitable trust and gift annuity administrator BNY Mellon, and work with Principia's CIO and COO/CFO on trust investments and accounting.
 - Collaborate with the marketing team on marketing materials and communications to promote planned giving opportunities to donors.
 - Collaborate with Annual Giving team to manage the 1898 Legacy Society
 - Oversee outright gifts of stock, gift annuities and charitable trust processes, and liaise with Advancement Services and Accounting offices.
 - Implement definable, repeatable processes to ensure smooth and effective management of the charitable giving process. Utilize appropriate technology to increase staff productivity and efficiency.
- Manage a donor portfolio of 100+ Tier 1 and 2 major and planned gift prospects
 - Prepare gift proposals for donors, prospective donors and their advisors—both in response to specific inquiries and as proactive strategies.
 - Develop donor engagement and strategic plans in support of Principia's fundraising priorities and fundraising category (major, planned, capital, etc.) goals.
 - Carry out donor engagement plans (identification, cultivation, solicitation, receipt, stewardship) needed to build philanthropic relationships between donors and Principia.

- Support broad advancement initiatives and events, including Reunions and Giving Tuesday

Core Competencies

- **Strategic thinker:** Ability to consider complex topics from multiple perspectives and offer innovative solutions.
- **Relationship Builder:** Builds and sustains strong connections with a genuine interest in others
- **Interpersonal Skills:** Strong interpersonal skills and the ability to work effectively and professionally with candidates and staff at all levels and build strong relationships
- **Communication:** Communicates well (written and verbal), delivers compelling presentations, has strong listening skills, passion and drive, and both intellectual and emotional intelligence
- **Ethical:** Treats people with respect; keeps commitments; inspires the trust of others; works with integrity; upholds organizational values
- **Dependability:** Works within deadlines and under occasional heavy workloads
- **Planning and Organizing:** Prioritizes and plans work activities; uses time efficiently; manages multiple projects and tasks simultaneously

Minimum Qualifications

- Student of Christian Science
- Supportive of Principia's mission, vision, and values as articulated here <https://www.principia.edu/about/mission>
- Bachelor's degree required
- 8-10 years of experience in fundraising and/or planned giving
- Proficient in Microsoft Office Suite, and development and/or database software
- Legal, tax, financial and planned giving experience preferred.
- Excellent communication, presentation, and interpersonal skills; ability to clearly articulate Principia's mission and impact.
- Willing to travel extensively – plans effective, efficient, and reasonably economical trips.

The statements above describe the general nature and level of work but are not a complete list of responsibilities and are subject to change at the discretion of Principia.

Equal Opportunity

Principia, a mission-driven institution, believes every person has the right to an equitable and respectful educational environment and workplace. Principia does not discriminate on the basis of race, color, national origin, ethnicity, gender (identity or expression), sexual orientation, family status, disability, age, or military or veteran status.

In hiring, admissions, and related decisions, Principia—as an institution with a religious mission—gives preference, where appropriate, to Christian Scientists.

For more information: www.principia.edu/jobs; Beth.Trevino@principia.edu; 618-374-5202

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