



## Development Officer, Planned Giving

Habitat for Humanity International (HFHI) is seeking a talented and dynamic individual to join our Planned Giving fundraising team in the role of Development Officer, Planned Giving. This exciting position provides an individual the opportunity to utilize technical expertise and relationship development experience to advance Habitat's work of building strength, stability, and self-reliance through shelter.

The best candidate for this position on our team will have 3+ years hands-on experience in cultivating donor-centric relationships which have resulted in major and planned gift donations. They will seek out and thrive in work environments that prize collaboration. They will have the ability to share Habitat's story and mission in a personal way. This development officer will be responsible for building a strategy to manage their portfolio to identify, close and retain relationships with individuals which result in planned giving commitments to the ministry and current revenue in support of our work. They will appreciate working in a strategic environment with metrics in place to help them achieve their annual visit, proposal, current revenue, and future revenue goals. This position will report to the Director, Planned Giving and will be based at HFHI's Administrative Headquarters in Atlanta, Georgia.

### Primary Responsibilities:

- Portfolio management: Develop portfolio of 200 planned gift prospects from the constituent relationship management (CRM) database; through identification/qualification outreach; collaboration with Individual Giving colleagues and Habitat affiliates; and by following up on PG Mailbox inquiries and marketing efforts. Record in CRM the inquiries from existing constituent records and add self-identified constituents to CRM.
- Cultivation: Complete and document 100 substantive calls per year with planned gift prospects. Substantive calls are defined as those that either include an "ask" for a planned gift or clearly advance the relationship toward an "ask". A good example of a substantive call is the presentation of a gift annuity proposal followed by asking for the gift. Submit at least 24 proposals to donors in a calendar year.
- Affiliate activities: Encourage and assist Habitat affiliates as they cultivate, solicit, and close planned gifts. This will include assisting affiliate resource development colleagues in preparing planned gift proposals and accompanying them when presenting the proposals. Depending upon the level of involvement, these activities may be considered substantive calls.
- Database integrity: Keep up-to-date CRM records on donor/prospect actions to demonstrate progress toward goals and track collaborations with other development officers. Secure and record up-to-date biographical data. Use CRM to prepare weekly, monthly and quarterly reports as necessary. Use CRM to evaluate effectiveness of cultivation, solicitation and marketing strategies.
- Professional development: commitment to continuing education to keep current with planned giving best practices.

### Required Qualifications:

Bachelor's degree or equivalent combination of education and work experience

- At least 3 years related experience
- Fondness for and appreciation of the wisdom and experiences of our more mature citizens; ability to gain their trust
- Excellent listening skills
- Superior presentation and communication skills, including the ability to write and speak clearly and effectively
- Experience collaborating with others in cultivating and closing planned gifts
- Unquestionable integrity
- Creative self-starter with high energy level, self-confidence and positive attitude
- Passion for and commitment to the HFH vision
- 3+ years of experience cultivating and closing planned gifts; demonstrated track record
- Working knowledge of planned giving techniques

Preferred Qualifications:

- Financial/ estate planning and sales background a plus
- Familiarity with planned giving software

To apply: <https://www.habitat.org/about/careers/development-officer-planned-giving>

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**About Habitat:**

Habitat for Humanity International is a non-profit, ecumenical Christian housing ministry. The purpose and goal of Habitat for Humanity International is to eliminate poverty housing and homelessness from the world, and to make decent shelter a matter of conscience and action. Habitat invites people of all backgrounds, races and religions to build houses in partnership with families in need. Habitat for Humanity has an Administrative Headquarters based in Atlanta, an Operational Headquarters based in Americus, Georgia, and Area Office bases of operations in Manila, Philippines for our Asia and Pacific work, San Jose, Costa Rica for our Latin American and Caribbean work and Bratislava, Slovakia for our Europe, the Middle East and Africa work.

*HFHI is an equal opportunity employer and seeks to employ and assign the best qualified personnel for all our positions in a manner that does not unlawfully discriminate against any person because of race, color, religion, gender, marital status, age, national origin, physical or mental disability, sexual orientation, veteran/reserve national guard status, or any other status or characteristic protected by law.*