Administrative Assistant for Gift Planning and Principal Gifts  
Haverford College  
Haverford, Pennsylvania  
https://www.haverford.edu/

THE INSTITUTION

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.

The Institutional Advancement Division propels Haverford’s mission and values through inspired engagement and philanthropy. This Division supports 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, their relationships with the College and their fellow alumni are viewed as lifelong and the Institutional Advancement Division strives to enrich them through different engagement and volunteer opportunities.

This is an exciting time as Haverford College is 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. Expecting to conclude in the next six months, this collaborative community-wide effort will set the institutional aspirations and priorities that will inform the 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 Services, 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. Enthusiastic, high-caliber professionals are sought to join the existing team of excellent colleagues and help propel Haverford forward through the launch of the comprehensive campaign and fulfillment of Institutional Advancement’s multi-year and multifaceted plan.

For additional information, please visit their website at https://www.haverford.edu/.

THE POSITION

Reporting to the Executive Assistant and the Executive Director of Gift Planning and Principal Gifts, the Administrative Assistant for Gift Planning and Principal Gifts provides high-level administrative and strategic support. The Administrative Assistant is a key member of the Institutional Advancement Team and a pivotal partner to the Charitable Gift Planning and Principal Gifts team, the Executive Assistant, and the other cohort of Administrative Assistants.

The Administrative Assistant manages all aspects of administrative tasks and processes. While working independently and in teams, the Administrative Assistant is highly proficient in proactively attending to highly detailed information and projects. The Administrative Assistant performs a broad range of tasks of a highly confidential nature, requiring initiative, critical thinking, and good judgment to make independent decisions. The Administrative Assistant holds responsibility for the day-to-day operations of the department of Charitable Gift Planning and Principal Gifts.

The Administrative Assistant is a self-starter and problem solver who takes direction well and is comfortable operating independently and also part of a team in a fast-paced environment.

Primary Responsibilities

- Serves as a trusted partner to the Executive Director as a front-facing representative of the department of Charitable Gift Planning and Principal Gifts.
- Manages daily operations of the department of Charitable Gift Planning and Principal Gifts including fielding inquiries by phone and email to the Department and responding/addressing comprehensively.
- Manages and ensures appropriate and timely follow-up on internal and external requests for information or action; maintains a “to do” list and meets regularly with Executive Director to manage and determine priorities.
- Prepares Gift Illustrations and Gift Contracts with the utmost accuracy, precision and in a timely manner.
- Independently addresses requests and issues, ensuring timely replies, resolution, and closure while briefing the Executive Director on same.
- Drafts an array of internal and external correspondence in coordination with the Executive Director initially and with the goal that these will be done independently.
- Proof and enter contact reports from donor visits in CRM database (Raiser’s Edge).
- Follow up any and all contacts with benefactors directly and also enter in CRM database (Raiser’s Edge).
- Serves as the primary lead coordinator for all internal meetings.
• Schedules and coordinates travel arrangements, which may include suggesting and requesting priority meetings with constituents, developing itineraries, and handling logistics, and assembling travel packets with briefings and other background materials.
• Provide monthly updates on progress toward area goals.
• Manages all aspects of travel reporting and reimbursement.
• Develops and implements project goals and related tasks for timely completion.
• Serves as liaison to Stelter (vendor) and prepares materials, photos and mailing list for quarterly emailings.
• Learns and maintain knowledge of planned giving software (PG Calc) and using this software, prepares illustrations for gift proposals, contracts and other illustrations in an accurate and timely fashion for RMs in IA.
• Participates in the production of all office publications and target mailings including drafting and coordinating copy and production with vendors and preparing mailing lists, postage requests, etc.
• Tracks responses received from planned giving marketing initiatives, ensuring too that all are recorded in CRM.
• Collaborates with Assistant Director of Donor Relations and Stewardship on ensuring that all reporting from agent (State Street Bank and Global Advisors) is filed appropriately, as too all financial statements associated with planned gifts including trusts managed by others.
• Manages all aspects of meetings led by the Executive Director, including scheduling, coordinating the agenda, securing the space and creating any associated materials; scope may include meetings with campus partners, departmental meetings, annual meeting with SSGA.
• Simultaneously manages multiple projects with competing priorities and works effectively and with attention to detail under short deadlines.
• Organizes and analyzes data in a detail-oriented manner under deadline pressure.
• Assists the Executive Director with all matters related to the management of her portfolio, including scheduling of meetings and travel, gifts, events (such as alumni weekend, family and friends weekends, the Jacob P. Jones Society Reception, Ice Cream Social, etc); proofing of meeting notes and placement in the CRM; follow up actions; etc.
• Recruits and supervises the student worker, including assigning work projects and support duties to the student worker.
• Operates equally well independently and in teams, with initiative and discretion in all interactions with constituents in a diverse community.

Additional Responsibilities
• Serve as project manager for significant projects as assigned.
• Remain current on best practices in Institutional Advancement and regarding gift and tax law through independent study, participation in group seminars and workshops, as well as through one-on-one training.

This position’s work location/hours will follow that of the College and Institutional Advancement’s policies and procedures.
**Education, Training, & Experience**

- Bachelor’s degree required.
- Eight to ten years of executive level assistance, preferably in a college or university setting including advancement/development. Candidates with experience in law or banking will be considered. Background as a paralegal desirable.
- Program, staff and budget management experience.
- Strong organizational and interpersonal ability.
- 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.
- Superior written and oral communication skills, creativity and demonstrated success in managing multiple projects.
- Strong computer skills as a high-end user of Microsoft Office, and Raiser’s Edge or other fundraising database. Experience using PG Calc software highly desirable.

**Special Requirements**

- 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.
- Possession of a valid U.S. driver’s license and ability to pass a Motor Vehicle Record Check is required.
- Evening and weekend work may be required.
- Some travel may be required.

For inquiries, nominations, and applications please contact:
Marie O’Riordan, Partner
610-924-9100 • moriordan@lambertassoc.com

Leaders in Executive Search for Nonprofit Organizations
Lambert & Associates
222 S Manoa Road, Suite 201 • Havertown, PA 19083 • 610-924-9100
www.lambertassoc.com