



Senior Planned Giving Officer

Pine Street Inn

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Katharine Kaplan

VICE PRESIDENT

Development Guild DDI

978-270-8941

kkaplan@developmentguild.com

developmentguild.com

BOSTON | NEW YORK

Pine Street Inn seeks an ambitious Senior Planned Giving Officer to identify, cultivate, solicit, and steward a portfolio of major planned giving prospects.

About Pine Street Inn

Pine Street Inn opened its doors in 1969. Over nearly five decades it has grown into New England’s largest nonprofit resource for homeless and formerly homeless adults. Throughout the ‘80s and ‘90s, Pine Street expanded from offering basic necessities—food, clothing, shelter and health care—to offering programs that help guests take significant steps in their journey out of homelessness and regain some of what they have lost – relationships, life skills, employment, and housing. In the past five years, Pine Street has significantly expanded its inventory of permanent supportive housing to provide lasting solutions to homelessness.



Mission: Pine Street Inn partners with homeless individuals to help them move from the streets and shelter to a home and assists formerly homeless individuals in retaining housing. Pine Street provides street outreach, emergency services, supportive housing, job training and connections to employment. Pine Street tirelessly advocate for collaborative solutions to homelessness.

Pine Street’s programs include:

- **Permanent Supportive Housing** – More than 900 formerly homeless individuals live in 40 residences and in scattered-site rental units throughout Greater Boston. The program for tenants is a supportive housing model – permanent housing coupled with on-site support staff to help each individual regain their highest level of independence. Specialized housing is available for seniors, adults with mental health disabilities, and veterans. Pine Street currently has a one-year-or-longer housing retention rate of 92%.
- **Emergency Shelter** – Each night, more than 670 men and women are provided with emergency shelter at one of Pine Street’s four locations. The Inn offers a warm and safe bed, two nutritious meals, shower and locker facilities as well as health care and case management services including substance abuse treatment and psychiatric support. Innovative programs such as Front-Door Triage and Rapid Rehousing are creating new paths out of Pine Street’s shelters into the stability of housing.
- **Job Training** – Pine Street provides job training in food services and housekeeping, providing individuals with the skills they need to secure jobs. Approximately 140 individuals are served in job training programs each year. iCater is a social enterprise that extends the training and opportunities for Food Service trainees, with net proceeds directed to the job training programs.
- **Street Outreach** – Pine Street’s outreach teams travel throughout Greater Boston to offer food, blankets, health care, and referrals to approximately 115 unsheltered men and women daily. The Inn is currently the only organization offering outreach in Boston every night.

Today, Pine Street Inn serves over 1,900 individuals a day. From emergency services, to needs assessment, counseling and case management, to job training and placement in permanent housing, Pine Street Inn is providing the short-term remedies and long-term solutions to end the experience of homelessness. In 2019, Pine Street Inn is celebrating its 50th anniversary and embarking on the public phase of a \$50 Million Campaign (to be announced in late summer/early fall).

About the Position



Reporting to the Director of Campaign and Individual Giving, the Senior Planned Giving Officer (SPGO) will work closely with senior-level development staff, volunteers, and other key stakeholders. The SPGO will plan and implement strategies for identification, cultivation, solicitation, closure, and stewardship of major planned giving prospects and lead the planned giving program. The SPGO will also carry a portfolio of donors and prospects and will be expected to meet ambitious goals.

Key Responsibilities

- Hold primary responsibility for gifts of estates, trusts, and various other financial venues that reflect financial planning and deferred giving opportunities.
- Serve as planned giving fundraising liaison for Pine Street Inn and prepare written materials about the intricacies of financial, legal, and tax-related aspects of charitable gift planning in order to engage donors.
- Proactively identify, cultivate, solicit, and steward planned giving prospects and serve as the planned giving advisor for all PSI planned giving donors.
- Support other staff members working with donors on deferred and planned gifts such as trusts, charitable annuities, life insurance, wills, and bequests.
- Working with Development Operations, ensure that all systems and processes from gift documentation to reporting are accurate and tailored to align with the needs of the Advancement and Business Offices.
- Enhance donor gift planning and giving by remaining current in areas of gift possibilities available and the current laws and regulations governing such gifts.
- Lead strategic efforts for planned giving pipeline movement, gift proposals, policy development, and goal setting.
- Manage planned giving prospects and donors; develop tracking systems and reports in collaboration with Development Operations.
- Reactivate Pine Street Inn's planned giving society, including marketing materials and events.

Key Qualifications

- A deep commitment to Pine Street Inn and a keen understanding of PSI's mission and goals, as well as the ability to articulate its goals
- Strong organizational and time management skills with exceptional attention to detail.
- Excellent communication skills, both verbal and written, with a strong ability to influence and engage a wide range of donors and build long-term relationships.
- Minimum of 7 years' related experience in planned giving in a college, independent school, or other mission-driven nonprofit institution.
- Proven record of directing planned giving programs.

- Demonstrated ability to handle multiple competing priorities and meet established personal and team goals.
- Possess the highest level of integrity, donor confidentiality, and discretion with sensitive information, tasks, and relationships.
- Experience with planned giving, giving societies, reporting tools, and best practices for tracking and stewarding planned gifts moves management.
- Skills in proofreading and editing, along with an attention to detail and follow-through. Computer literacy, particularly in word processing, using Internet resources, and using donor and prospecting databases such as Raisers Edge or Salesforce (non-profit) is required.
- An understanding of the current laws regarding taxability of donations, familiarity with deferred giving strategies, and knowledge of a diverse array of financial instruments are essential.
- An understanding of the requirements for financial reporting of planned giving donations, and an ability to work collaboratively and strategically with Development Operations and the Finance Department to ensure proper allocation and reporting of all planned gifts.
- Some travel, weekend, holiday and after-hours work required.



All qualified candidates will receive consideration for employment without regard to race, color, religion, sex, national origin, disability, veteran status, or any other characteristic protected by law.

Please email your cover letter and resume in confidence to:

PSI_SPGO@developmentguild.com

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For more information about Pine Street Inn please visit <https://www.pinestreetinn.org>

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About Development Guild DDI

Development Guild DDI is a nonprofit leadership development consulting firm that provides nonprofit executive search, fundraising counsel, and campaign services. We bring a powerful combination of discipline and innovation to every client engagement, delivering solutions that are both strategic and deeply rooted in experience and analysis. Drawing upon more than 2,500 client engagements and 40 years working in every nonprofit sector, our collaborative approach is distinguished by candid dialogue and supported by cutting-edge technology. We commit to understanding and respecting your unique culture and to translating that knowledge into viable solutions.

