



World ORT | ORT America

Planned Giving Officer

New York, NY

Background

ORT's global educational network, schools, colleges, and international programs reach more than 350,000 people across 40+ countries. With generous support from its donors, ORT's schools and programs reach underserved students by bridging the gap between aptitude and opportunity, as they work to expand knowledge, build autonomy, and strengthen Jewish identity.

In Israel, World ORT *Kadima Mada* ("Science Journey") programs focus on empowering disadvantaged students in the country's under-resourced periphery to become self-sufficient and gain confidence in their ability to succeed. Due to ORT's innovative programs and quality instruction in science, technology, engineering and math (STEM), ORT students in Israel obtain translatable knowledge and transferable skills that can meet the demands of the 21st century job market.

In **Europe**, the **Former Soviet Union**, and **Latin America**, ORT expands access to high quality STEM education, while simultaneously enriching individuals' Jewish identities. In the process, ORT is bringing back to life a religious and cultural experience that was lost to many regions for decades. Through the study of Jewish culture, language, history and traditions, ORT's Jewish curriculum counters assimilation, renews Jewish communal life, and deepens connections to Jewish identity for generations to come.

Position

The Planned Giving Officer is responsible for identifying, cultivating, soliciting, and stewarding donors who are interested in making legacy and other planned gifts. He/she will manage a portfolio of prospects and donors, support the organization's planned giving strategy, and collaborate with development colleagues to integrate planned gifts into overall fundraising efforts.

Responsibilities

Donor Identification & Portfolio Management

- Manage a portfolio of planned giving prospects and donors, with a focus on bequests, donor-advised funds (DAFs), and other deferred gifts.
- Qualify prospects through outreach, discovery visits, and donor data analysis.
- Develop individualized cultivation and stewardship plans.

- Partner with other development officers on prospect and donor support; serve as a resource for other development officers and the organization on all aspects of planned giving.

Gift Development & Solicitation

- Educate donors and prospects about planned giving vehicles, including bequests, beneficiary designations, charitable gift annuities (CGAs), DAFs, and charitable remainder trusts (CRTs), as appropriate.
- Conduct donor visits (in person, virtual, and phone) to discuss philanthropic goals and legacy intentions.
- Secure verbal and documented gift commitments and legacy intentions.

Stewardship & Donor Relations

- Steward legacy donors through ongoing communication, recognition, and engagement.
- Support and manage a legacy recognition society and program, including events and communications.
- Ensure appropriate acknowledgment and documentation of planned gifts.

Qualifications

The ideal candidate will possess the following qualifications and qualities:

- 5+ years of fundraising or related experience, with exposure to planned giving, major gifts, or donor relations.
- Demonstrated success in donor cultivation and relationship management.
- Strong communication, presentation, and interpersonal skills.
- Ability to discuss basic planned giving concepts comfortably with donors.
- Experience working with bequests, CGAs, DAFs, and other planned gift vehicles.

Personal Attributes

- Passion for the mission of strengthening Jewish life and global Jewish communities.
- A builder and strategic thinker—proactive, innovative, and able to anticipate challenges.
- Collaborative leadership style with the ability to bridge marketing and fundraising cultures.
- High emotional intelligence, cultural sensitivity, and ability to inspire stakeholders across continents.

Compensation & Benefits

- Salary in the range of \$160,000-\$175,000 depending upon experience.
- Paid family leave.
- Comprehensive health insurance.
- 401k plan.
- Commuter benefits.
- Jewish Holidays

- Shortened Friday hours.
- Opportunities for global travel.

For more information or to apply, please email:

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