

*POSITION  
ANNOUNCEMENT*



## Part-Time Administrative Assistant for Legacy Planning

Jesuits West

### **The Institution**

The Society of Jesus, the largest men's religious order in the Roman Catholic Church, assigns some 17,000 priests and brothers to ministries worldwide. In pastoral, educational, and other ministries, our priests and brothers collaborate with laymen and women, civic organizations, local dioceses, and other religious orders. As catalysts for change, we invest personnel and funding in those “turning points” in society where we believe the greatest good can be achieved. Our ministries express the power of faith doing justice by combining belief in fundamental human dignity with advocacy for the poor and marginalized.

The USA West Province (“Jesuits West”) supports a 10-state region that includes Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, and Washington. Jesuits West, a province of approximately 540 Jesuits, is led by Father Sean Carroll, S.J. with an 11-member executive team overseeing an approximate staff of 30 with offices in Los Gatos, California and Portland, Oregon.

### **Position Concept and Basic Function**

The Administrative Assistant provides administrative support to the Director of Legacy Planning in the department’s effort to grow, evaluate, and prioritize the pool of current and potential donors. Responsibilities include general administrative tasks key to ensuring the smooth functioning of the office.

**Accountability:** Direct report to Director of Legacy Planning

**Location:** Los Gatos, California

**Department:** Advancement Office

**FLSA:** Non-Exempt: Part-Time/20 hours per week M-F 9:00am – 1:00pm

## **Reporting to the Director of Legacy Planning, responsibilities will include:**

### **ESSENTIAL FUNCTIONS**

We are seeking a collaborative administrative professional to support fundraising programs and activities for the Director of Legacy Planning.

Under direct supervision, provide administrative and routine support to legacy fundraising programs and activities. Work with front-line fundraising staff, donors, volunteers, and other staff to assist in establishing and maintaining relationships with all legacy constituencies.

### **LEGACY PLANNING**

- Supports the Director of Legacy Planning in preparing materials in response to inquiries from donors and/or estate planning professionals for their review.
- Assist the Director with correspondence and scheduling.
- Assist with planning and executing Planned Giving events.
- Maintain the Trust, Probate, and Estate files.
- Ensure that planned gift records and reports are compiled and maintained in Raiser's Edge Database.
- Help Maintain Planned Giving section of Province Web Site.
- Tracks the Legacy Planning department budget. Ensures proper expense documentation and reporting to the Treasurer's Office.
- Perform other Advancement Office related duties as assigned.

## Qualifications

- Excellent oral and written communication skills.
- Prior history of working with an Advancement system utilizing a large relational database; Raisers Edge experience a plus.
- Ability to interact with diverse groups and build strong relationships.
- Ability to work well under the pressure of deadlines, be able to manage several projects simultaneously, and be able to manage shifting priorities as needed.
- Strong initiative, organizational ability, independent judgment, and attention to detail.
- Ability to maintain confidentiality.
- Ability to work well both independently and as part of a team.
- Ability to recall, recognize, and communicate interrelated information pertaining to benefactors.
- Ability to take a project from conception to completion with little supervision.
- Ability to produce mass mailings, mail mergers and write compelling letters to a mass audience.
- Experience using Microsoft products, including Word, Excel; use of Office 365 a plus.
- Ability to set up Zoom and Microsoft Teams meetings.

## Preferred

- Excellent people skills and ability to interact with a wide range of people.
- A willingness to learn new technology.
- Raiser's Edge and NXT experience.
- Office 365 experience.
- A University degree.
- Ability to foster a cooperative work environment.
- Understanding of the principles, practices, and beliefs of the Roman Catholic Church and the Society of Jesus preferred.

## Requirements and Application Procedure

Applicants must submit a cover letter and resume to [UWEjobs@jesuits.org](mailto:UWEjobs@jesuits.org). Review of applicants for employment will begin immediately and continue until the position has been filled.

*Jesuits West makes employment decisions without regard to race, color, sex, national origin, marital status, age, and disability unrelated to job performance. The Province hires without regard to religion when Catholic faith is not a job requirement, and welcomes people of all faiths.*