



## **Director of Gift Planning Job Description**

*The Community Foundation of Anne Arundel County (CFAAC) is in search of a seasoned professional to join the CFAAC team as its Director of Gift Planning.*

### **About CFAAC**

CFAAC's mission is to inspire and promote giving in Anne Arundel County by connecting people who care with causes that matter. We envision a vibrant and generous community that comes together to enhance the quality of life for all. Our role is to promote philanthropy, help to identify critical needs in Anne Arundel County, partner with donors to help them meet their philanthropic and financial goals, and promote collaboration to help strengthen local nonprofits.

CFAAC is in search of a Director of Gift Planning for our 501(c)(3) nonprofit community foundation based in Annapolis, MD. This full-time position plays a very important function in our small, mighty, and fast-paced organization with a reputation for high-quality donor service and community partnership. We are a fast-growing community foundation with a strong desire to increase our community impact to improve the quality of life for all residents of Anne Arundel County.

### **The Position**

The Director of Gift Planning is a lead relationship and fund management position at CFAAC, responsible for the planning, implementation, and execution of a strategy to attract major, planned, and legacy donors to partner with CFAAC to fulfill their philanthropic and financial goals.

The Director of Gift Planning works closely with the President and CEO and the Director of Development to expand CFAAC's relationships with current and prospective donors and professional advisors, educating them about CFAAC services and charitable giving options.

He or she will work to move current and prospective donors through the donor cycle including identifying, engaging, evaluating, soliciting, recognizing, and stewarding current and future major donors, planned giving prospects, and legacy donors.

### **Our Ideal Candidate**

CFAAC is seeking a fundraising professional who is energized by being a critical member of a dynamic team helping to increase philanthropy in Anne Arundel County. The successful candidate must have the following:

- Deep commitment to philanthropy and the social good
- Proven fundraising success and 5 to 7 years of major gift and planned giving experience demonstrating initiative, self-motivation, and follow-through
- Technical and administrative self-sufficiency and high attention to detail are required to maintain a moves management system for identified donor prospects
- Excellent organizational and time management skills
- Proficiency in Microsoft Office Suite
- Exceptional verbal and written communications skills
- Ability and willingness to manage multiple tasks and priorities
- Congenial personality, sense of humor, self-aware, low-drama, flexible, resourceful, emotionally intelligent, confident, self-motivated, and results-oriented
- Ability to work as part of a team and maintain a keen sensitivity to confidentiality
- Ability to analyze and revise operating practices to improve effectiveness and efficiency
- **Community Foundation experience preferred**
- **Candidates with professional affiliations and CFP, CAP, and/or CFRE certifications preferred**

### **Position Responsibilities**

- Respond to inquiries from prospects, donor representatives and professional advisors regarding major, planned, and legacy gifts.
- Work collaboratively with CFAAC's communication team to develop new print and online materials about charitable giving options for prospective donors and professional advisors.
- Conduct professional advisor and donor research and draft and prepare fund agreements.
- Maintain a high level of expertise regarding state and federal taxes, gift and estate giving methods and the legal aspects of charitable giving.
- Provide Professional Advisor Services – Solicit and schedule meetings with professional advisors to educate them about CFAAC. This will include individual meetings, as well as small and large group meetings and presentations.
- Promptly and accurately respond to professional advisor requests for information about CFAAC services and charitable giving options.
- Identify new professional advisors and track contacts with advisors and client referrals.
- Employ an effective major donor prospect management system, assuming a portfolio of prospects for cultivation and engagement with a goal of

encouraging new charitable funds, the development and stewardship of legacy gifts, and support of CFAAC and its grantmaking initiatives.

- Develop and implement the organizational strategy for donor, fund holder and professional advisor education and engagement in partnership with the President and CEO and the Director of Development.
- In collaboration with the President and CEO and the Director of Finance, serve as primary contact with legal counsel on issues related to unusual or complex gifts. Update the gift acceptance policies as needed.
- Participate in recognition events for current donors and fund holders, professional advisors, and legacy donors.
- Help design and participate in targeted prospective donor and professional advisor educational programs.
- Participate in the creation of annual development department plans, goals and strategies.
- Attend staff meetings and serve on internal committees as appropriate.
- Contribute to CFAAC publications and marketing materials by providing data, reports, content and proofreading as needed. Contribute to communications content, when appropriate, including impact reports, press releases, blog posts, op-eds, and letters to the editor.
- Represent CFAAC at meetings and events which may occur during or outside of normal work hours.
- Participate in all aspects of the gift cycle – initiate contacts with potential leadership and major gift donors, develop appropriate cultivation strategies, move potential donors in an appropriate and timely fashion toward fund creation, and maintain stewardship contact with donors.
- Work collaboratively with colleagues, volunteer leadership, and professional advisors (attorneys, wealth advisors, accountants, and trust officers) to cultivate and expand current giving by planned gift donors.
- Oversee process of establishing new funds by assisting donors in selecting philanthropic interests that complement and enhance donors' goals.
- Support the giving interests and practices of our donors and fund holders, creating rewarding experiences and high impact results.
- Plan, implement, and evaluate donor cultivation and stewardship events such as small gatherings, luncheons, cocktail events, and educational opportunities to build partnerships with donors.
- Provide philanthropic advisory services to a portfolio of fund holders.
- Maintain a broad understanding of Anne Arundel County's needs and its nonprofit community and use this knowledge to maintain relationships with current, new, and prospective donors and fund holders.
- Participate regularly in community activities and events to enhance the image and position of the Community Foundation. Activities include speaking

to groups, participating in civic engagement, and overall immersion in the community by networking to foster the culture of philanthropy.

- Other duties as assigned.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

### **Physical Demands/Work Environment**

The work is performed primarily in an office setting with some local travel required. Lifting and transporting of meeting and event materials, including AV equipment, may be required from time to time.

### **Supervision:**

The Director of Gift Planning reports to the President and CEO.

### **Salary and Benefits**

Salary is competitive and dependent on education and experience. A comprehensive benefits package includes health insurance, holiday, vacation, and sick leave. Simple IRA is available with a matching contribution after 90 days of employment.

### **We'd love to hear from you!**

If this sounds like the job for you AND you have the skills and requirements listed above, then we are eager to meet you. Please submit a cover letter and a resume to Mary Spencer, President and CEO at [mary@cfaac.org](mailto:mary@cfaac.org). Please put YOUR NAME, and Director of Gift Planning in the Subject Line.

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*CFAAC is an equal opportunity employer. We greatly value the diversity of individuals, ideas, perspectives, insights, and values, and what they bring to our mission, culture, and outcomes.*