



## **Position: Director of Planned Giving**

**Status:** Exempt

**Reports to:** Chief Executive Officer

### **Summary of Primary Duties:**

Under the direction of the Chief Executive Officer, the Director of Planned Giving's primary responsibilities are 1) collaborate with estate planning attorneys, CPAs, and financial advisors to support charitable giving through the Foundation with their clients and 2) represent the Foundation as a trusted partner in giving and philanthropy for the North State region.

### **Essential Functions:**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Serve as the Foundation's primary liaison and key representative with the professional advisor community
- Deliver technical expertise and sophisticated understanding in advanced techniques and methods of charitable giving and philanthropy
- Develop, execute, monitor and evaluate annual development plans for each county in conjunction with the CEO
- Support donors and professional advisors in creating funds for giving now and planning for giving in the future
- Provide planned giving services including gift illustrations and other charitable giving strategies
- Develop meaningful relationships with donors and professional advisors to make plans through their wills, trusts and beneficiary designations
- Develop and implement professional advisor touchpoints plan that includes providing continuing education opportunities, events, and materials for informing their clients
- Develop deep, trusting, and sustained relationships with current and prospective donors, their families and professional advisors
- Evaluate existing and new methods of donor solicitation, cultivation, communication and legacy programs to connect with current and prospective donors
- Engage the Board in development activities around prospect identification and introductions in conjunction with the CEO
- Provide timely, warm, courteous professional support to referred donors and their professional advisors
- Assist as spokesperson for Foundation, representing the organization with credibility and enthusiasm, leveraging its strong brand, and clearly communicating its vision and value proposition
- Actively seek speaking engagements and community engagement around leadership, generosity, community collaboration, and philanthropy in conjunction with the CEO
- Stay current with trends in philanthropy, including legislative impacts
- Collaborates with staff on timing and content of communication with current and prospective donors

### **Competencies:**

- Relationship-driven individual who easily establishes rapport and trust with diverse audiences and who has a reputation for leading through influence tempered by humility
- Possess exceptional written/verbal communication and interpersonal skills
- Strong team player known for collegiality and predisposition to work collaboratively
- Highly organized and attentive to detail
- Excellent time, project, and prioritization management
- Demonstrated ability to synthesize and translate complex concepts into clear, compelling content
- Independent judgment is required to plan, prioritize and organize a diversified workload



**Supervisory Responsibility:**

This position has no supervisory responsibilities.

**Position Type/Expected Hours of Work:**

This is a full-time position. Hours of work and days are Monday through Friday, 8 a.m. to 5 p.m. Weekend and/or overtime hours may occasionally be expected.

**Travel:**

Local travel is expected for this position in addition to reliable transportation, minimal overnight travel may be required. Valid driver's license, proof of auto insurance coverage and willingness to complete and sign the CA DMV Pull Notice Program Waiver (INF-1101) for authorization for release of driver record information is required.

**Preferred Education and Experience:**

- Bachelor's degree or equivalent
- Professional degree or designation such as JD, MBA, CPA, SFP, CFRE, CAP, SCPG or other similar qualifications desirable
- Experience advising, developing, and administering planning giving vehicles, including bequests, retirement plans and trusts
- Strong written and verbal communication skills
- Experience with donor and prospect data management
- Proficient in current Microsoft Office Suite, Google Docs and Forms, internet savvy

**Work Environment:**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines. The position also operates outside occasionally.

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk and hear. This is largely a sedentary role; however, some filing is required. This would require the ability to lift office products and supplies, up to 20 pounds, open filing cabinets and bend or stand, as necessary. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms. Specific vision abilities required include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

**EEO Statement:**

Community Foundation of the North State is an Equal Opportunity Employer.

**Other duties:**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

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