



COMMUNITY FOUNDATION FOR MONTEREY COUNTY
DIRECTOR OF GIFT PLANNING
JOB DESCRIPTION
June 2022

JOB PURPOSE: Senior development employee to enhance the organization's capabilities in stewardship, cultivation and solicitation efforts with individual donors, major donors, and legacy donors. The Director of Gift Planning (DGP) plays a central role in the development of long-term relationships built on a firm understanding of the donor's interests, passions, and values. This position reports to the Senior Vice President of Philanthropic Services and will provide supervision to the Philanthropic Services Coordinator. Based on the duties described below, this is an exempt position.

SCOPE OF RESPONSIBILITIES

Helps CFMC donors accomplish their philanthropic goals by providing gift planning expertise and philanthropic services to fundholders, donors, professional advisors and prospects. Identifies, cultivates and solicits new donor relationships. Supports fundraising activities of affiliate funds, serves as the primary liaison to the CFMC Professional Advisor Council and implements development activities throughout the county.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Donor Development: Works with the Senior VP of Philanthropic Services to actively participate in the identification, cultivation, and solicitation of new prospects.
- Assists with the design and implementation of Affiliate Fund development plans, in collaboration with the CFMC affiliate advisory boards, Philanthropic Services staff, CFMC Community Impact staff, and development committees. Helps facilitate fundraising and development strategies.
- Works with a portfolio of existing and prospective donors to provide ongoing philanthropic services and increase level of donor engagement and major gifts through meetings, presentations, and outreach.
- Plans and implements educational programs, donor engagement events, communications and stewardship activities designed to develop and maintain good relationships with potential and current donors and professional advisors.
- Provides customized gifts illustrations for Charitable Gift Annuities, Charitable Remainder Trusts and other complex gift plans for donors and professional advisors.

- Works with donors, agencies and professional advisors to set up new funds, prepare fund agreements, and draft letters of intent, ensuring donor instructions are accurately documented.
- Engages Legacy Society members through stewardship and outreach activities, growing the membership of the Legacy Society through personal invitations to prospective members.
- Grant Writing and Reporting: Oversees the full range of activities required to prepare, submit, and manage grant proposals to foundations and other funding sources. When necessary, perform or coordinate prospect research on foundations and corporations to evaluate the prospects for grants. Assist other CFMC departments to gather the information necessary to report to corporate/foundation funders on current grant programs.
- Works with Philanthropic Services staff to develop donor management and tracking systems for prospects, existing fund holders, donor engagement, donor retention, legacy society members and professional advisors.
- Coordinates, documents, and monitors all donor prospect relationships to ensure positive and purposeful donor relations and ongoing engagement.
- Assists the President/CEO and Senior Vice President of Philanthropic Services on other assignments as requested.
- Supervise and manage the Philanthropic Services Coordinator.

Professional Advisor Outreach

- Target planned giving activities to build stronger relationships with Professional Advisors Work with estate planning attorneys, CPAs, CFPs, trust departments, wealth managers, stockbrokers, and other advisors. Communicate with advisors on the benefits to their clients of utilizing the CFMC. Work closely with advisors in helping individuals understand the role of the CFMC in their estate planning or current charitable giving. Participate in meetings of the local fund-raising associations and estate planning councils.
- Serve as the primary Liaison with the CFMC Professional Advisor Council in coordination with the Senior VP of Philanthropic Services.
 - Assist with Annual Professional Advisor Luncheon.

The DGP brings a proven knowledge of development, gift planning and donor relations to the CFMC. This position description is intended to be general and will evolve over time. The description is subject to periodic updating. At management's discretion, the employee may be assigned different or additional duties from time to time.

QUALIFICATIONS

- Bachelor's degree; Master's degree and/or CFRE desirable.
- Minimum of five years of experience at the director level leading development efforts in an entrepreneurial nonprofit environment.

- Passion and commitment to CFMC's mission. Mature individual with ability to drive agenda forward by building strong internal partnerships with diverse groups of constituents.
- Demonstrated success in networking to build creative and mutually beneficial business relationships within the corporate, public, and nonprofit sectors.
- Track record of working with individual, families, corporate, foundation, and government sources, and proven ability to expand and cultivate donor relationships over time.
- Proven experience and knowledge of the full spectrum of development, including planned giving, gift solicitations, stewardship, donor recognition and administration.
- Must be willing to work flexible hours, including some nights and weekends for special events.
- Strategic, analytical approach combined with professionalism and charisma.
- Strong organizational, writing and public speaking skills.
- A demonstrated commitment to the community and a desire to assist nonprofit organizations, donors and other Foundation constituents.
- High level of customer service.
- Team oriented with an ability to work cooperatively and effectively with colleagues.

PHYSICAL REQUIREMENTS

- Position requires minimal lifting (up to 25 lbs.), mostly deskwork.
- Strength and flexibility to work at a desk for up to five hours and access items on shelves and files located 0 to 60 inches above the floor.

President/CEO

Date

Accepted:

Director of Gift Planning

Date
