Helping Donors Share • Community Foundation FOR THE FOX VALLEY REGION, INC.

POSITION DESCRIPTION
Vice President Gift Planning
(or Director of Gift Planning)

DATE REVISED: May 3, 2017

JOB FUNCTION: The Vice President Gift Planning leads the Foundation's donor development efforts. Primary responsibilities include oversight of a comprehensive program to identify, cultivate and steward new and existing donors by facilitating outright and planned gifts that fulfill donors' charitable goals while also strengthening our quality of life in the Fox Valley region.

REPORTS TO: Vice President Donor Services and Gift Planning

INCUMBENT: tbd

DUTIES AND RESPONSIBILITIES:

- Support the Foundation's overall mission as a key member of a strong team. Embody Core Values.

- Spearhead the Foundation's efforts to identify, cultivate, and steward new and existing donors.
  - Implement the priorities outlined in the Foundation's comprehensive Development Plan.
  - Assess effectiveness and recommend improvements to the Development Plan to maximize impact.
  - Prepare all appropriate correspondence, documentation (e.g, fund agreements), and records relating to donor intent and goals.
  - Oversee strategic and administrative aspects of the Foundation's development/gift-planning efforts.

- Lead Foundation Campaigns.
  - *Friends of the Foundation* (annual operations) *Fund.*
  - *Endow Wisconsin* (endowment building) if launched
  - *Anniversary Giving Campaign(s)* if launched

- Oversee the Foundation's Himebaugh Legacy Circle.
  - Encourage membership among eligible donors; maintain regular contact with members.
  - Plan and provide regular stewardship and recognition opportunities for members and other donors not opting to join the HLC but have communicated their planned gifts.

- Monitor processing of testamentary gifts.
  - Coordinate with estate attorneys and administrators to ensure professional handling.
  - Track pending estates for stewardship and internal planning/accounting needs

- Oversee gifts of non-cash assets.
  - Provide lead staff support to the Community Real Estate and Personal Property Foundation (CREPPF) board.
  - Coordinate with others the acceptance and disposition of gifts through CREPPF.

- Oversee the Foundation's charitable gift annuity program.

  - Prepare all documentation, including tax calculations, relating to new and/or established gift annuities; coordinate recording and reporting of same through BMO.
  - Steward and otherwise maintain regular contact with annuitants.
  - Ensure that the Foundation's Audit & Budget committee is provided with all relevant information to assess individual annuities and the health of the annuity pool overall.

- Lead outreach efforts and nurture relationships with professional advisors.
  - Meet regularly with accountants, attorneys, financial planners, insurance advisors, trust officers, wealth managers, and other advisors to foster familiarity and engagement with the Foundation.
  - Upon request, provide in-office or outside presentations about the Foundation and/or charitable giving to advisors and/or select clients.
  - Plan and provide regular educational and/or networking opportunities for advisors.

- Assist affiliates with development efforts.

- Establish annual development goals/objectives; track staff and volunteer activity and productivity.

- Periodically report to the Foundation board and/or appropriate committees regarding same.

- Supervise administrative aspects of development and gift-planning efforts, including proper documentation of charitable funds and gift plans; recording and analysis of prospect and planned gift information; and generation of acknowledgement letters for extraordinary gifts, such as those establishing charitable funds, involving non-cash assets, or reflecting estate provisions.

- Monitor, interpret, and disseminate information about relevant tax and legal developments to staff, professional advisors, donors, and local non-profit organizations.

- Assist agency fund holders with gift acceptance and provide ongoing education around accepting non-cash gifts through the Foundation.

- Lead gift planning sessions for staff, agency fund holders and affiliates.

SKILLS AND QUALIFICATIONS REQUIRED:

- High level of professionalism, integrity and ethics.
- Patience, flexibility, and open-mindedness; sense of humor.
- Excellent oral, written and interpersonal communication skills.
- Highly motivated with strong attention to detail and organization.
- Ability to work independently and as part of a team.
- Knowledge of outright and planned gift fundamentals and financial/legal aspects of charitable giving.
- Minimum of a B.A. degree in law, finance, development or a related field and at least five years' experience working in development, planned giving, law, finance or a related field.

President's Signature: ____________________________________ **Date: ____________________**