

Salary Range: \$105,000.00 - \$125,000.00 Salary/year

Position Type: Full Time

Travel Percentage: Up to 50%

Application Link: [Director/Sr. Director, Gift Planning](#)

DESCRIPTION

The Director, Gift Planning manages and advances a portfolio of principal (\$100,000+) and planned-gift prospects and donors. This is a high-level individual contributor role that will support the identification, cultivation, solicitation, and stewardship of commitments for the Principal Gifts Campaign. This role will be responsible for implementing coordinated planned giving and endowment engagement strategies, including communications and donor stewardship activities that support long-term program growth.

The Senior Director, Gift Planning will exhibit a higher level of proficiency in the required job experience, skills and competencies.

PRINCIPAL DUTIES AND RESPONSIBILITIES

- **Portfolio Management and Fundraising:** Manages and advances a defined portfolio of principal and planned giving prospects with primary, secondary, and tertiary assignments. Advances prospects toward solicitation and commitment. Conducts or facilitates visits, strategic conversations, and solicitation discussions and follow-ups. Develops and implements donor strategies in coordination with team members and senior leadership in support of Principal Gifts Team fundraising goals and objectives. Conducts or facilitates a minimum of 20 meaningful portfolio interactions per month, including cultivation, solicitation, and stewardship, in coordination with volunteer peer solicitors and senior leadership, and documents activity.
- **Planned Giving and Endowment Program:** Develops and executes planned giving program plans. Develops and maintains a list of endowment funding and funded opportunities in coordination with senior leadership. Facilitates the incorporation of endowment and planned giving opportunities and gift agreements into principal gift proposals as appropriate. Supports policy alignment, review, and readiness.
- **Planned Giving Communications and Donor Engagement:** Plans and implements communications and activities including the planned giving website, newsletters, and Legacy Circle activities in coordination with the Marketing and Communications Team and senior leadership.

- **Tracking and Reporting:** Maintains accurate moves management and donor records and reports on activities.
- **Team Collaborations:** Participates as a Principal Gifts Team member. Maintains consistent communication with team members and senior leadership. Demonstrates discernment in engaging support for research, report and collateral preparation, and moves management tracking to maintain an appropriate balance between administrative tasks and donor engagement priorities. Supports a coordinated and aligned team environment.
- **Other:** Performs special assignments and other work as assigned. Takes on additional duties as needed to ensure the success of the Principal Gifts Team.

QUALIFICATIONS

EDUCATION:

Bachelor's degree in philanthropic studies, public administration, business, marketing, or other related field.

EXPERIENCE:

- 5-10 years of experience in individual major gift fundraising, preferably in a team-based, portfolio-driven environment, including the cultivation, solicitation, and presentation of basic planned and blended gift opportunities.
- Demonstrated ability to cultivate, solicit, and manage donor and volunteer relationships, and to strategically engage those individuals in peer-to-peer fundraising initiatives.
- Proficiency with Microsoft Office Suite and donor relations technologies, including, Raisers Edge, Salesforce, Crescendo, FreeWill, Wealth-X, and RelSci.
- Commitment to ethical standards as defined by the Association of Fundraising Professionals.
- Excellent written and verbal communication skills.
- Demonstrated flexibility, adaptability, and project management skills, with strong interpersonal abilities and the capacity to effectively interact with diverse staff, volunteers, and donors at all levels.

CERTIFICATION/LICENSES:

CFRE, CAP, J.D., CFP or associated credential preferred.