FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Vice President, Planned Giving   Division/Department: Philanthropic Advancement

Reporting To: Vice President & Director, Philanthropic Advancement

FLSA Classification: [x] Exempt [ ] Non-Exempt

Employment Type: [x] Full Time [ ] Part Time [ ] Intern [ ] Contract

POSITION SUMMARY

The Vice President, Planned Giving serves on the Philanthropic Advancement team at FFTC, working to cultivate and manage individual relationships within the Center for Personal Philanthropy in Mecklenburg County and across the region, with an emphasis on growing planned gifts to FFTC. With a current pipeline of more than $750 million in documented planned gifts, the Vice President will oversee this portfolio to steward planned giving donors as well as grow planned gifts to more than $1B. The Vice President will make personal planned giving asks of high net worth donors (including current and prospective fundholders), draft and execute charitable plans and provide subject matter expertise on FFTC's grantmaking and legacy giving. This position needs knowledge of and comfort with technical aspects of major and planned gift fundraising, including types of gifts, assets accepted, vehicles, and gift planning strategies, and a strong relationship management orientation to build appropriate stewardship practices across the organization for current and future planned giving donors.

The VP, Planned Giving joins FFTC at an exciting and important time for the discipline of planned giving. The pipeline has grown substantially in recent years, requiring more robust stewardship. Additionally, FFTC is launching an initiative in 2020 focused on growing planned gifts for discretionary grantmaking and this position will play an integral role in this work.

DUTIES & RESPONSIBILITIES

Business Development

- Develop the planned giving business strategy and philosophy through the creation of a 3-year business plan to grow planned gifts to more than $1B. The strategy may include a potential campaign for planned giving / branded legacy giving program, leveraging key leadership including CEO and Executive Team
- Track, cultivate and solicit new planned giving prospects, including existing fund holders, to identify opportunities to expand philanthropic relationships
- Expand and diversify the planned giving donor base through an ongoing cultivation and stewardship program which includes, but is not limited to, targeted outreach activities, personal visits and communications/marketing strategies
- Develop and maintain relationships with professional advisors as key referral sources and partners for planned giving and other opportunities and serve as a point of contact for advisors seeking information on behalf of clients
- Direct professional advisor marketing and programming strategies to drive increased unrestricted asset growth and broader legacy giving opportunities

- Partner with the key members of the team serving individuals and families to coordinate proposals for those with demonstrated interest in legacy giving
- Serve as advancement resource for one or more regional county affiliate foundations, as assigned
- Support members of the Executive Team and senior leadership to execute calling plans and follow up
- In partnership with Philanthropic Advancement and Community Programs teams, identify a strategy specific to the regional county affiliates to grow unrestricted regional assets
- Serve, along with key staff members, as key public face for FFTC in business development presentations
- Provide, monitor and report regularly on the progress of the planned giving program to the Executive leadership and FFTC Governing Board

Relationship Management

- Direct strategic and day-to-day responsibilities of stewardship of the current planned giving portfolio (including existing fundholders), coordinating with dedicated relationship managers (particularly for existing fundholders) as appropriate and maintaining individual assigned fund relationships
- Engage planned giving donors and prospects in FFTC activities and ensure proper recognition of donors; create program to educate current and prospective planned giving donors on the impact of planned giving, the technical elements to effectuate planned giving, and how to craft meaningful legacies
- Develop personal philanthropic relationships with potential planned giving donors, serve as dedicated relationship contact at FFTC for assigned portfolio of relationships, particularly those with no current fund relationship with FFTC
- Meet with donors to create, review and update current charitable plans, providing drafting and editing support to properly reflect donor wishes and legacy goals
- Oversee operational elements of planned giving administration, in partnership with finance, legal and donor relations team to ensure effective and consistent documentation and implementation of planned gifts, including database management and planned gift entry and tracking processes (leveraging FFTC's current database Raisers Edge)
- In conjunction with the legal team and donor relations team, support implementation of realized planned gifts, including trust administration, new fund creation, executor communication, fund management and documentation, asset review & management and troubleshooting
- Work with Deputy Counsel, EVP and other key team members on implementation and management of key policies and procedures related to planned giving and gift realization including, but not limited to, planned gift fees, records management, and reporting

Marketing & Strategy

- Support FFTC's marketing efforts by joining internal marketing committee, meeting monthly, to identify and execute strategic priorities related to key business lines and working with external vendors on marketing research or other opportunities
- In conjunction with the Marketing & Communications team, plan, create and implement marketing efforts to promote FFTC's planned giving program, including website content, marketing collateral, direct mail, advertising and donor profiles
- Develop effective strategies to proactively build awareness of planned giving options and the resources provided by FFTC to prospective donors
- Develop communication vehicles to educate prospects, clients and professional advisors about FFTC planned options, as well as to promote the establishment of planned gifts with FFTC
- Serve on cross-functional teams working on strategic projects impacting the Centers for Giving, including investments, pricing, product development, database management, and stewardship practices, as appropriate

- Plan, track and report on activities with prospects using database system and provide strategic input and direction on database best practices
- Manage processes and procedures to integrate planned giving into the asset development efforts of the team, including but not limited to data tracking, dashboards, information sharing, and cross-selling

Product Knowledge

- Develop a command of FFTC products and services, including planned giving and planned gift vehicles, to speak knowledgeably to prospective fundholders about working with FFTC, including fund types, investment options, acceptance of complex assets and closely held business interests, etc.
- Demonstrate knowledge of community needs and grantmaking landscape as critical to value proposition of FFTC as planned giving partner
- Represent FFTC in the community and in targeted efforts including networking, speaking engagements, conferences and nonprofit presentations to speak about planned giving and the resources FFTC can provide in this space
- Keep abreast of current tax laws and planned giving trends

JOB QUALIFICATIONS

- Bachelor's degree required (focus on business, marketing, finance or related field); professional license (JD, CFP) preferred
- At least 7-10 years of experience, preferably in fundraising, development, or financial services/wealth management
- Excellent oral and written communications skills and interpersonal skills
- Detailed and in-depth knowledge of planned giving and its complexities: estate planning, tax laws, wills, trusts, etc.
- Extensive communications, development or marketing experience in a corporate or nonprofit setting preferred
- Ability to handle sensitive client and donor information with high level of confidentiality and discretion
- Excellent computer skills including working knowledge of Microsoft Office applications
- Previous experience with the Raiser's Edge database preferred
- Initiator who is detail-oriented and a self-starter, customer service and sales orientation
- Ability to set priorities, handle multiple tasks and meet deadlines with a high degree of accuracy and urgency, while receiving deliverables from multiple team members
- Ability to be flexible in a work environment often filled with challenging situations and resource constraints

POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

All Employees: [x] Communication & Interpersonal Skills

Executive Team: [ ] Leadership [ ] Strategic Thinking [ ] Fiscal Stewardship

All Supervisors: [ ] Delegating Responsibility & Empowering Employees [ ] Managing Employee Performance [ ] Ensures Consistent Policies & Practices

General:

[ ] Affiliate Management [ ] Budgeting & Cost Awareness [ ] Building Organizational Commitment

[ ] Building Team Environment [X] Client Records [ ] Concern for Employee

					Satisfaction
	Customer Skills		Dependability		Ensures Proper Training in New Technologies
	Entrepreneurial Orientation		Equipment Skills	x	Fund Management
	Implementing New Technologies		Initiative		Innovative Thinking
	Job Skills		Managing Meetings	x	Managing Multiple Priorities
x	Meeting Targets	x	Presentation Skills	x	Product Knowledge
x	Productivity	x	Project Management		Quality of Work
x	Relationship Building/Networking		Results Oriented	x	Technical Skills
	Time Management		Training & Development	x	Writing Skills

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