



COMMUNITY FOUNDATION
OF GREATER BIRMINGHAM

Director of Gift Planning

Position: Full time, exempt

Reports to: VP, Philanthropic Services

Job Description revised: January 2019

The Organization

The Community Foundation of Greater Birmingham is the largest community foundation in Alabama, with assets of approximately \$215 million, annual grants of \$18 million, and more than 470 component funds representing a variety of donor and charitable interests across the five-county region it serves. Our work serves the Foundation's vision for a just, prosperous and unified region where every person is empowered to reach their full potential. We hope to achieve this mission by igniting passion for transformational change in partnership with donors, community members, and civic leaders. The Foundation believes in the power of philanthropy to positively impact communities by guiding donors in leveraging their charitable investments and employing clear strategies to guide its own community investments.

Principal Duties

A member of the five-person Giving Strategies team, the Director of Gift Planning is responsible for working with donors, professional advisors and the foundation staff to develop complex and deferred gifts for the benefit of greater Birmingham.

1. Working with the VP Philanthropic Services, create annual strategies, metrics and proposed budget for outreach, donor engagement, education, marketing and stewardship of gift planning.
2. Lead staff member primarily responsible for cultivating relationships with the professional advisor community (attorneys, wealth advisors, accountants, trust officers, life insurance professionals, etc.) to build understanding of the role the Community Foundation can play in serving the philanthropic goals of their clients through:
 - Consultative and planning meetings with planning professionals and their clients
 - Presentations at professional advisor firms
 - Cultivation of new advisor relationships, particularly those serving individuals underrepresented in the Community Foundation's donor base
 - Management of the Professional Partners in Philanthropy Leadership Forum
 - Intentional, strategic stewardship of relationships with partner advisors, including planning and executing ongoing education on gift planning strategies and opportunities for the advisor community, namely the Foundation's Professional Partners in Philanthropy
3. Serve as a primary contact for new gift inquiries, working collaboratively with the VP Philanthropic Services, key Foundation staff, professional advisors and prospective donors to solve problems and create and close current and deferred gifts.
4. Working with VP Philanthropic services and Finance team to ensure that gifts, gift plans, and fund agreements are in compliance with the law, government regulations, Community Foundation National Standards, and CFGB Policies.
5. Work with Director of Donor Stewardship to cultivate donors who have made deferred gift commitments to the Foundation.

6. Educate prospective donors and the community about gift planning by:
 - Working with the Director of Communications, creating digital content and print materials to answer the most common questions raised in the gift planning process.
 - Planning and executing education programs and events for audiences including but not limited to prospective donors, the Community Builders Legacy Society, and professional advisors.
 - Staying abreast of industry best practices, government regulations and laws pertaining to charitable giving.
7. Responsible for developing and implementing outreach strategy to cultivate relationships with underrepresented donor groups, including those in outlying counties or minority populations.
8. Working collaboratively with Foundation leadership to develop resources around key Foundation initiatives, providing significant support, both strategic and administrative, to developing and implementing fundraising campaign activities, including identifying and soliciting prospective donors in collaboration with other Foundation staff, Board members, and volunteers.
9. Perform all administrative duties related to tracking calls, reporting results and providing proposed budgets, goals and reports as requested.

All members of the Giving Strategies Team are expected to be team players, and work collaboratively with members of Marketing & Communications, Program and Finance Teams. The ideal candidate will be personable, an active listener who can present solutions to meet donor goals, cultivate relationships that serve the Foundation's strategic goals, and an entrepreneurial thinker to help develop new opportunities to tell the Community Foundation's unique story to previously untapped audiences.

Knowledge, Skills & Abilities

- Bachelor's degree and a minimum of five years professional experience in not for profit development, trust or financial services, or a related field required. Advanced training or professional certification is preferred (JD, MBA, CAP, CFP, etc.).
- Understanding of estate planning and/or income, capital gain and estate tax issues preferably consisting of cultivating, soliciting and closing major and/or planned gifts.
- Excited about initiating conversations with professional advisors and prospective clients/donors.
- Must exhibit on a daily basis a high degree of initiative and responsibility to manage a variety of projects from start to a successful and timely conclusion.
- Professional record of serving clients within very high standards of service excellence, responsiveness and integrity.
- Must exercise discretion with highly sensitive and confidential information, and demonstrate good judgement in working with a diverse donor and prospect population.
- Superior oral and written communication skills balanced by an ability to listen well; high emotional intelligence.
- Willingness to take a proactive role in team efforts, promote collaboration and cooperation between team members and encourage open communication in multidisciplinary environments.
- Excellent computer skills, especially Microsoft Office suite, and relational database programs (CRM).
- Knowledge of, and commitment to, Birmingham and its nonprofit sector.