

Director of Gift Planning Job Description



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Position: Director of Gift Planning

Position Type: Full-Time, Exempt

Supervisor: Vice President for Advancement

Position Summary: The Director of Gift Planning will work closely with the VP for Advancement, other members of staff, and volunteer leaders to create and execute a comprehensive charitable services program emphasizing donor and professional advisor engagement, education, and quality stewardship.

The ideal candidate is a skilled professional with proven success in relationship-building, charitable gift planning, persuasive presentations, project management, and working effectively in teams. He or she must possess a high degree of initiative, curiosity, and empathy, along with a genuine desire to help others and raise the quality of life throughout DuPage County.

Organization Summary: The DuPage Foundation is DuPage County's philanthropic leader. As a 501(c)(3) public charity, we receive contributions and bequests from individuals, corporations, organizations, and foundations seeking to make a difference for our community and the causes that matter most to them. We have grown to more than \$95 million in assets and awarded more than \$45 million in grants to not-for-profits serving the residents of DuPage County and beyond.

Position Responsibilities:

- Create and execute a comprehensive charitable services program including the setting of annual strategies, metrics, and a proposed budget for outreach, donor and professional advisor engagement, education, marketing, and stewardship in support of the Foundation's strategic plan.
- Develop resources in support of Foundation programs, initiatives, and giving opportunities, and provide significant support, both strategic and tactical, to developing and implementing fundraising campaigns.
- Serve as a lead contact for new gift inquiries, advise on gift options, answer questions, and close current and deferred gifts.
- Cultivate and steward a robust portfolio of current and prospective donors with a focus on strategies to help them achieve their short- and long-range charitable goals.
- Educate current and prospective donors about charitable giving opportunities and strategies through:
 - Personal consultations.
 - Leading the creation of digital and print materials to address common questions raised in the gift process and highlight solutions.
 - The planning and execution of programs and events focused on charitable gift strategies for audiences such as individuals and families, closely-held business owners, corporations, and professional advisors.

- Cultivate relationships with the professional advisor community (attorneys, wealth advisors, accountants, bank & trust officers, life underwriters, etc.), build their understanding of the Foundation and charitable giving strategies, and obtain referrals through:
 - Personal consultations.
 - Presentations to professional advisor firms.
 - Management of the Foundation's Professional Advisor Committee and continuing education events.
- Ensure that all gifts, gift policies, and fund agreements comply with federal and state law, government regulations, Community Foundation National Standards, the AFP Donor Bill of Rights, and Foundation policies.
- Keep up-to-date on developments in philanthropy, laws and regulations pertaining to charitable planning, Community Foundation National Standards, and effective charitable giving strategies.
- Perform all administrative duties related to tracking calls, reporting results, and providing proposed budgets, goals, and reports, as requested.
- Lead on or assist with other projects as requested.

Knowledge, Skills & Abilities:

- Bachelor's degree and a minimum of 7 - 10 years' professional experience in not-for-profit development, trust or financial services, or a related field required. Advanced training or professional certification is preferred (E.g., JD, MBA, CAP®, CFP®, CFRE®, etc.).
- Strong understanding of estate planning and/or income, capital gain, and estate tax issues—preferably consisting of cultivating, soliciting, and closing major (six and seven-figure+) outright and deferred gifts.
- Demonstrated success in building strong rapport and relationships with professional advisors and prospective clients/donors.
- Superior oral and written communication skills with high emotional intelligence and the ability to listen well.
- Must daily exhibit a high degree of initiative and responsibility to manage a variety of projects from start to a successful and timely conclusion.
- Desire to take a proactive role in team efforts, promote collaboration and cooperation among team members, and encourage open communication in multidisciplinary environments.
- Excellent computer skills including Microsoft Office suite, relational databases—especially Blackbaud Raiser's Edge NXT®, and presentation software such as Canva.
- Ability to be an effective ambassador for the Foundation among diverse constituent groups.
- Willingness to occasionally work beyond regular business hours including some evenings and weekends.
- Existing knowledge of the DuPage County community and philanthropic landscape a plus.

To Apply: Email a PDF résumé and cover letter with “Director of Gift Planning Position” in the subject line to Hiring Manager at apply@dupagefoundation.org. All applications will be considered under the strictest of confidence. **NO CALLS PLEASE.**

Hiring Policy: The DuPage Foundation considers applicants for all positions without regard to gender, race, color, religion, age, national origin, ancestry, disability, political affiliation, marital status, sexual orientation, pregnancy, or any other legally protected status.

The DuPage Community Foundation d/b/a DuPage Foundation raises the quality of life throughout DuPage County by fostering philanthropy, connecting donors to area needs, and building community partnerships.