

EPISCOPAL RELIEF & DEVELOPMENT

JOB DESCRIPTION

TITLE: Director, Major Gifts and Planned Giving

REPORTS TO: VP, Advancement

DEPARTMENT: Advancement

DIVISION: Major Gifts and Planned Giving

LOCATION: Remote

FLSA STATUS: Exempt

EFFECTIVE DATE: February 1, 2024

PRIMARY FUNCTION/PURPOSE: The Director of Major Gifts and Planned Giving will work with the Vice President, Advancement in advancing Episcopal Relief & Development's core values and strategic goals while building out and executing a strategy to expand support from individuals and family foundations. They will lead frontline fundraisers to reach their annual and planned gift fundraising goals. They will also lead prospect research to build a robust pipeline for future growth. The Director will also manage a focused personal portfolio of existing high-level donors and prospects and serve as the point of contact for all planned giving inquiries. In addition to the Major and Planned Gift team leadership, the Director will collaborate with colleagues on adjacent teams to build resources to support fundraising and relationship management.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Strategy Development

- Partner with Vice President, Advancement to increase revenue and donor base by developing major annual and planned giving strategies from targeted messaging to cultivation and engagement plans and well-developed solicitations.
- Lead current and design new initiatives to expand major gifts (\$10K+) from long-term, new and prospective individual donors and family foundations.
- Develop and implement a plan to educate donors on planned gifts; identify prospective planned gifts donors and cultivate them to secure new bequests and more complex planned or blended gifts.
- Build out our prospecting strategy, using screening tools and techniques to identify long-term or new individual donors who have greater giving capacity.
- Develop and monitor projections and budgets for prospect research, major and planned giving.

- Create and oversee procedures and processes for efficient operations including use of our donor database that will support growth in major and planned gift revenue.

Team Leadership

- Manage and support frontline fundraisers to maximize gifts from their donor portfolios and meet their financial goals. Foster strategic collaboration amongst fundraisers.
- Ensure fundraising priorities and expectations are understood and followed by fundraisers around messaging, cultivation, engagement, solicitations, and legal compliance.
- Accountable for all donor research, this position will establish expectations for a robust prospect research program and support frontline fundraisers in the continuous execution of cultivating, acquiring and retaining new donors.
- Oversee the usage of our donor database (RENXT) to help the team track prospecting, engaging, cultivating and soliciting donors to meet their annual financial and planned gift goals.
- Serve as the point of contact for all planned giving inquiries.

Cross-team Collaboration

- Collaborate with relevant colleagues to formulate strategies to promote prospecting, engagement, and cultivation and stewardship of major donors.
- Build collateral materials to support frontline fundraising work.
- Provide Episcopal Relief & Development's program and leadership team members with effective strategies, talking points and outreach materials for approaching and cultivating donors and prospects. Train and mentor staff outside of Advancement to guide them through donor contact and follow up.
- Contribute to an organizational environment where teamwork, collaboration, passion for the mission, and dedication are expected and valued.

Portfolio Management

- Qualify, develop, and maintain year-round relationships with a portfolio of **50 – 75** individual donors or prospects to annual and multi-year funding, as well as planned gifts
- Develop and enact cultivation and solicitation strategies for a targeted portfolio of top prospects and donors with an affinity for Episcopal Relief & Development and capacity to make leadership-level annual and planned gifts.
- Build and manage a network of relationships with prospective donors involving Episcopal Relief & Development's volunteer leaders and staff. Facilitate and coordinate all communication with these prospects.

SUPERVISORY REQUIREMENTS:

- Minimum of 3 years of management and team leadership experience required. This position will supervise the frontline fundraisers.
- They must also collaborate with other Advancement staff to oversee and guide staff who carry out prospect research and database management.

EDUCATION:

- Advanced degree plus 7 – 10 or more years of significant professional experience in individual and major gift fundraising preferred.
- In lieu of degree requirement, applicable work or life experience may be considered.

EXPERIENCE:

- Candidates must have ability to close 6 and 7 figure annual, planned and blended gifts and experience in cultivating and securing gifts from prospective individual donors.

- They must have demonstrated experience in working with individuals and their respective family members or financial advisers to secure planned gifts that meet current regulations as well as adhere to the policies of Episcopal Relief & Development.

RELATED SKILLS:

- Strong passion for and demonstrated commitment to Episcopal Relief & Development's mission.
- Extensive knowledge and working experience of major and planned gifts fundraising and demonstrated ability to provide strategic direction and daily management for these fundraising initiatives, resulting in improved performance and revenue growth.
- Demonstrated track record of successful solicitations, including the ability to proactively identify, build, and manage a portfolio of major annual and planned gift prospects where the donor constituency is not immediately apparent.
- Excellent communication and presentation skills (both written and oral) and the ability to listen and target communication to specific interests of varied audiences.
- Experience developing sound donor strategies and qualifying and disqualifying prospects using research tools and instincts.
- The ideal candidate will be an exceptional fundraiser ready to take on and elevate a donor portfolio with emerging potential.
- Gravitas paired with the professional integrity and ambition to effectively represent and promote Episcopal Relief & Development externally at the highest levels.
- Ability and comfort in utilizing donor database and other applications to lead a data-driven approach to increasing philanthropic revenue from diverse constituencies. Raiser's Edge experience a plus.
- A motivated, unflappable team player with exceptional communication skills along with interpersonal savvy.
- Commitment to the highest standards of professionalism, integrity, excellence, and diversity.
- Strong personal commitment to the mission and organizational values of Episcopal Relief & Development and to cultural diversity, equity and inclusion efforts in the workplace

OTHER REQUIREMENTS (Competencies):

- Collaborative and Communicative
- Courageous and Accountable
- Engaging and Inspiring
- Equitable and Inclusive
- Innovative and Strategic
- Ambitious and Knowledgeable
- Productive and Results Oriented
- Resilient and Adaptable

SALARY & BENEFITS:

Annual salary range of \$\$150,000-155,000

Competitive, comprehensive benefits package offered

How To Apply:

Email resume and cover letter to careers@episcopalrelief.org with the subject line “**Director, Major Gifts and Planned Giving**”

“For more information, visit our website at www.episcopalrelief.org.

The position description is a guide to the critical duties and essential functions of the job, not an all-inclusive list of responsibilities and/or qualifications.

Position descriptions are reviewed and revised to meet the changing needs of Episcopal Relief & Development at the sole discretion of management.

The position description is a guide to the critical duties and essential functions of the job, not an all-inclusive list of responsibilities and/or qualifications. Position descriptions are reviewed and revised to meet the changing needs of Episcopal Relief & Development at the sole discretion of management.

Episcopal Relief & Development is committed to creating a diverse environment and is proud to be an equal opportunity employer (EEO). All employment practices will be administered without regard to an individual's actual or perceived protected characteristic(s) - race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, veteran status or any other legally protected status.

Episcopal Relief & Development offers reasonable accommodations for individuals with disabilities. You may request accommodation at any time.

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee:_____ Date:_____