

Job Description and Specification

Job title: Director of Philanthropy – Individual & Planned Giving
Reports to: Executive Director

Description

The Director of Philanthropy – Individual & Planned Giving has 3 key areas of responsibility. They are:

- 1) achieving or exceeding revenue goals from a group of assigned individual donors on an annual basis;
- 2) achieving or exceeding an assigned number of planned giving commitments on an annual basis;
- 3) working as an individual contributor, team member, and team leader (depending on the project or situation) to help the Foundation achieve short, medium, and long term goals.

Specific responsibilities and duties related to achieving or exceeding revenue goals from a group of assigned individual donors on an annual basis include but are not limited to:

- Identifying a portfolio of approximately 100 individual donors and prospects who are giving or have the potential to give \$1,000 or more annually. This includes individuals and individually-controlled DAFs and Foundations.
- Cultivating, soliciting, and stewarding donors/prospects in portfolio to maximize life-time giving and to achieve or exceed \$250,000 in annual revenue.
- Developing moves management plans for key donors and prospects.
- Writing, calling, and meeting in-person with donors and prospects in portfolio throughout the identification, discovery, cultivation, ask, and steward development cycle.
- Inviting Board and Committee members to assist in identifying, cultivating, soliciting, and stewarding donors in portfolio.
- Renewing the portfolio on a semi-annual basis to remove those who are no longer donors or prospects and identifying new donors and prospects to add to portfolio.
- Engaging with donors and prospects in portfolio by conducting at least 50 in-depth, in-person meetings on an annual basis.
- Developing an understanding of the philanthropic desires of donors and prospects in portfolio.
- Offering a range of opportunities to donors that match donor/prospect interests with Library needs for the purpose of retaining and growing gifts from existing donors and/or developing initial gifts from prospects. This includes but is not limited to: unrestricted annual gifts; higher level memberships; multi-year gifts; events; endowment gifts; capital gifts; and, program-restricted funding.

Specific responsibilities and duties related to achieving or exceeding an assigned number of planned giving commitments on an annual basis include but are not limited to:

- Identifying donors and prospects who are in portfolio for planned giving asks and making planned giving asks of those donors so that at least 10 new commitments are made annually.
- Planning and ensuring the execution of at least one planned giving focused event annually. This involves working with other staff to identify who should be invited and to carry out the experience provided so that planned giving donors are stewarded well and so that prospects are developed.
- Carrying out or ensuring that others carry out activities to steward those who have made a planned giving commitment so that these donors are retained at an 80% or higher rate. This could include emails, mail, in-person, and event activities.

Specific responsibilities and duties related to working as an individual contributor, team member, and team leader (depending on the situation) to help the Foundation achieve short, medium, and long term goals include but are not limited to:

- Assisting in the development and execution of short-, medium-, and long term plans related to the overall performance of the Foundation. This can include plans related to annual operations, events, membership and development, capital/comprehensive campaigns, and other Foundation activities.
- Acting as a staff leader or co-leader to fundraising committees as assigned. This includes working directly with other staff members, committee leaders, and committee members to develop agendas, develop and assign goals, track progress toward goals, etc.
- Developing and delivering a benefit/stewardship program to individual donors, based on contribution type and level, in conjunction with benefit and stewardship programs developed and delivered for membership, corporate and foundation donors.
- In conjunction with other Foundation and Library staff, developing and/or assisting in the development of collateral to be offered to donors and prospects, including capital/principal, program, and event material.
- Joining other Foundation and Library staff on in-person donor and prospect meetings.
- Learning the offerings of the Library and the Foundation, staying current with the offerings, and utilizing these offerings throughout the donor lifecycle.
- Developing and delivering reports that track progress toward goals.
- Playing a key role in capital/principal gift fundraising on an ongoing basis.
- Documenting activity in the donor data base (currently Blackbaud Raiser's Edge NXT).
- Engaging other Friends Foundation and Library staff members, trustees and volunteers in fundraising efforts as appropriate and necessary.
- Working with the Board of Trustees and Foundation committees to attain annual and longer term growth goals.
- Wearing a variety of hats related to the operation of the Foundation, including participation in event, book sale, and membership activities.
- Representing the Foundation and the Library so that others view the organizations positively.

Background, Education and Experience sought:

- A Bachelor's or higher level degree.
- 5 or more years of experience related to the responsibilities and duties described above.
- Strong speaking, writing, and listening communications skills.
- Proficiency with a donor data base.
- The ability to discover donor desires and to ask based on those desires.
- A sense of urgency.
- A track record that includes raising \$500K or more from individual donors on an annual basis.
- Experience with individual donors in at least four of the following: unrestricted giving; restricted giving; planned giving; endowment giving; capital fundraising; and event sales.
- Excellent written, listening, and verbal communication skills.
- The interpersonal skills and emotional intelligence to establish, build and maintain positive relationships with a variety of internal and external stakeholders.
- The ability to take in qualitative and quantitative information and to act based upon that information.
- A project management track record that demonstrates the ability to plan, prioritize, negotiate, and work so that desired goals are achieved in a desired time frame at a desired cost.
- The ability to appropriately handle multiple priorities and deadlines.
- The ability and desire to work as an individual contributor, as a team member, and/or as a team leader depending upon the project and situation.
- An interest and/or affiliation with the library field and the missions of the Library and Foundation.

This Job Description and Specification is not all inclusive. Other duties and responsibilities may be assigned at any time for any reason. The duties and responsibilities described in this document may also be removed and/or changed at any time for any reason.