

## **Community Foundation of Greater Greensboro Job Description**

**Position Title:** Philanthropy Director

**Reports To:** Chief Philanthropy Officer

### **Overview:**

The Community Foundation of Greater Greensboro is a public charity dedicated to strengthening the greater community of Greensboro, North Carolina. Under the direction of a volunteer board of community leaders, the Foundation receives charitable funds from donors, invests those funds, distributes funds to charitable causes and provides services and grants to nonprofit agencies and the community.

The Community Foundation of Greater Greensboro is an equal opportunity employer.

To formally recognize our work in diversity, equity and inclusion, in 2018, CFGG adopted a Diversity, Equity, and Inclusion (DEI) statement, as follows:

“Our communities are diverse. They include people of all ages and abilities, creeds and religions, cultures, ethnicities, gender identities, national origins, races, sexual orientations, and socioeconomic backgrounds. To pursue our mission, we will embrace our diversity, create opportunities for equity, commit ourselves to fairness, and promote inclusion of all people.”

### **Position Summary:**

The Philanthropy Director will serve as a key member of the Development & Donor Engagement (DADE) team, with primary responsibility for cultivating and opening new funds, stewarding current Legacy Society members while guiding new donors through the planned giving process, and providing strategic support for the Professional Advisors Committee and Professional Advisors Network.

The Philanthropy Director will lead efforts to cultivate and establish new charitable funds at the Community Foundation, including both permanent and non-permanent funds that support the philanthropic goals of individuals, families, businesses, and organizations. This position will work closely with donors and professional advisors to identify charitable interests, recommend giving strategies, and guide the fund establishment process from initial conversation through implementation.

Legacy gifts to the Community Foundation provide permanent funding to address needs in our community and demonstrate the value of charitable giving for generations. This position will update, maintain and market the Community Foundation’s Legacy Society through supporting bequests and other charitable giving programs.

The Philanthropy Director will also staff the Community Foundation’s Professional Advisors committee and program, made up of leaders in the financial services industry including but not limited to estate attorneys, CPAs and wealth advisors. Their mission is to encourage more charitable giving by individuals, families, and organizations in

response to community needs, and to heighten awareness of the benefits of giving through CFGG within the professional community of advisors.

The Philanthropy Director's work will require an effective balance of program organization, monitoring program details, and timely, appropriate written and verbal communication with a wide range of people, in both one-on-one and group settings.

### **Major Responsibilities:**

- Cultivate, solicit, and steward relationships with prospective and current donors, fundholders, and professional advisors to grow charitable giving through the Community Foundation
- Guide donors through the process of establishing new permanent and non-permanent funds, including donor advised funds, scholarship funds, designated funds, field-of-interest funds, unrestricted funds, and nonprofit agency endowments
- Manage caseload of existing fundholders
- Work collaboratively with donors, attorneys, accountants, financial advisors, and other stakeholders to structure charitable giving vehicles that align with donor intent and Foundation policies
- Support donor engagement and stewardship activities related to new and existing funds, including fund agreements, follow-up communication, and ongoing relationship management
- Update and manage the organization's Legacy Society program including maintaining records and recognition lists, updating marketing and communication materials, and creating and running meaningful cultivation events
- Meet regularly with donors and professional advisors to discuss the Foundation's planned giving program including bequests, charitable gift annuities, charitable remainder trusts, charitable lead trusts, life insurance policies, and retirement account assets
- Assist with identifying, cultivating, and stewarding planned giving prospects and Legacy Society members
- Provide support for the Professional Advisors Committee and program, including working with the Chair on quarterly agendas and meeting content, developing continuing education programming, participating in face-to-face meetings with advisors, creating marketing materials and toolkits, and coordinating all aspects of committee meetings including scheduling, notices, meeting materials, IT needs, and minutes
- Represent the Community Foundation at meetings, networking events, educational programs, planned giving groups and conferences and community functions as assigned
- Ensure a volunteer leadership pipeline is in place and that adopted protocols are met, including nominations and selections for all chair positions
- Communicate clearly and regularly with donors, volunteers, committee members, advisors, and internal stakeholders
- Maintain accurate and timely constituent, fund, and gift records within the organization's CRM system

- Collaborate with other members of the DADE team to support fundraising, stewardship, and engagement initiatives across the Foundation
- Provide backup support to accept and process charitable contributions, including check deposits and related documentation
- Perform other duties as assigned in support of the Community Foundation's mission and strategic goals

### **Required Capabilities:**

#### **Professionalism:**

- Supports the mission, vision and strategic goals of the Foundation to serve both internal and external customers
- Conducts self in a professional manner
- Follows and supports Foundation policies and procedures
- Maintains appropriate professional appearance
- Evaluates own performance and assumes responsibility for professional development
- Maintains confidentiality
- Maintains current knowledge of all changes affecting area of work

#### **Teamwork:**

- Participates as a team member utilizing a collaborative style to achieve mutual goals
- Provides proactive, creative cross-functional thinking and ideas to enhance service to customers
- Demonstrates ability to work effectively with others
- Participates in meetings or committees as needed

#### **Equity & Inclusion:**

- Works effectively with individuals from diverse backgrounds
- Demonstrates an awareness of bias and works towards overcoming it

### **Knowledge, Skills & Abilities:**

#### **Preferred:**

- Minimum of a Bachelor's degree is required.
- Minimum of ten years of experience in the development field for non-profit organizations or foundations; experience could include a combination of development, customer service, project management, and/or sales development
- Understanding of planned giving strategies and general estate and gift tax considerations related to charitable philanthropy
- Experiencing supporting nonprofit boards and other leadership committees
- Experiencing working within or alongside major gift and planned giving departments
- Deep interest in and commitment to the work of the Community Foundation of Greater Greensboro, with a demonstrated commitment to the Greater Greensboro area, its people and their concerns
- Strong interpersonal, organizational, time-management, networking and development skills with diverse constituent groups, with a demonstrated attitude

toward inclusiveness

- Experience working within CRM software

Qualifications:

- Superior verbal and written communication skills, computer literacy (including most primary office software packages), and competency in public speaking
- Demonstrated ability to organize and coordinate several activities at one time
- Excellent conceptual and analytical skills; ability to research and analyze information
- Good sense of self with demonstrated qualities of integrity, loyalty, discretion, caring and self-motivation
- An ongoing commitment to training in both areas of soft skills and technical skills to maintain and improve current skills and knowledge