

JOB ANNOUNCEMENT

Associate Director of Planned Giving

The Chesapeake Bay Foundation seeks an Associate Director of Planned Giving in the Development Department to be based at the Philip Merrill Environmental Center located in Annapolis, MD.

THE CHESAPEAKE BAY FOUNDATION

Established in 1967, the Chesapeake Bay Foundation (CBF) is the largest regional nonprofit conservation organization dedicated to saving the Chesapeake Bay, its rivers and streams, and the wildlife that call it home through education, advocacy, litigation, and restoration. Since 2010, CBF has engaged in a focused effort to defend and implement the Chesapeake Clean Water Blueprint, a binding federal and state collaborative agreement aimed at reducing pollution to the science-based, legally-affirmed levels established by the U.S. Environmental Protection Agency (EPA). The Blueprint is expected to be fully implemented by 2025. If the states and the federal government achieve Blueprint goals, the Bay will finally—after decades of failed efforts—be removed from the Clean Water Act’s impaired waters list. Successfully implementing the Blueprint depends on a well-informed, engaged, active, and diverse constituency of members, advocates, and volunteers who speak up and take action to save the Bay.

CBF has a staff of approximately 210 employees working in offices in Annapolis, Maryland; Richmond and Virginia Beach, Virginia; Harrisburg, Pennsylvania; and Washington, D.C. as well as 15 field education program locations. Our staff and volunteer corps work throughout the region educating students and adults, advocating for clean water policies, restoring waterways, and litigating when necessary.

CBF's headquarters office in Annapolis, Maryland is the Philip Merrill Environmental Center, the world's first U.S. Green Build Council's LEED platinum building. In 2014, CBF opened the Brock Environmental Center—one of the world's most energy efficient, environmentally smart buildings—in Virginia Beach, Virginia.

CBF has an annual budget of approximately \$30 million and is supported by over 300,000 members and e-subscribers. For more information on CBF, please visit cbf.org.

DEPARTMENT DESCRIPTION

Development

The mission of Development is to provide financial resources for CBF to meet its long-term vision of saving the Bay. It establishes and implements strategies to motivate donors to contribute to the organization's programs and projects through two primary areas of activity: development and membership.

CONTEXT OF THE POSITION

The Associate Director of Planned Giving champions gift planning as an essential component of CBF's overall fundraising strategy. To secure sustainable legacy support for CBF, the Associate

Director manages a portfolio of planned gift prospects and works cross-departmentally to develop and implement planned gift donor identification, qualification, cultivation, solicitation, and stewardship strategies both in and out of structured campaigns. The incumbent also serves as a subject matter expert on planned gifts, planned giving programs, and estate and gift tax laws.

Essential functions include:

1. Planned Giving Portfolio Management

- a. Manage a portfolio of planned giving prospects to qualify, cultivate, solicit, and steward through the confirmation of new planned gift commitments.
- b. Advise solicitors and the broader Gift Officer team on planned gift cultivation and solicitation strategies for their prospects. Prepare gift illustrations and proposals as needed.
- c. Conduct in-person and virtual visits with planned gift prospects and donors.
- d. Engage CBF staff and leadership as well as industry professionals such as financial advisors and estate planning attorneys in promoting CBF planned gift opportunities.
- e. Serve as point of contact for members of CBF's legacy society to answer questions and provide service.
- f. Craft and manage, in conjunction with the stewardship team, a plan to ensure legacy society members are effectively recognized and connected to CBF's mission.

2. Planned Giving Marketing

- a. Develop, implement, and track multi-channel marketing strategies to generate leads, uncover previously undisclosed gift commitments, and secure new planned gifts.
- b. Work with the Development Writer to ensure all planned giving messaging is consistent throughout all venues including proposals, solicitor talking points, and marketing campaigns.
- c. Identify, with the Research and Prospect Management team, planned giving prospects in CBF's database and analyze key data points to aid in marketing and solicitation efforts.
- d. Coordinate with vendor(s) on the administration of CBF's planned giving marketing and website services.
- e. Collect stories and testimonials from planned gift donors for use on the planned giving website, planned gift marketing pieces, and more.

3. General Program Administration

- a. Support, and lead when appropriate, campaign design and implementation of planned giving goals and strategies for both dedicated planned giving campaigns and as part of larger comprehensive campaigns.
- b. Develop annual work plans, revenue budgets, and expense budgets for the planned giving program. Monitor and adjust the program as necessary to reach goals and budget targets.
- c. Serve as point of contact for all inquiries about planned gifts and gifts of property, including real estate, vehicles, vessels, personal property, etc.
- d. Serve as point of contact for estate executors, attorneys, and financial advisors who communicate with CBF about planned gifts or lifetime gifts like IRA Rollovers.
- e. Develop metrics and reports, with the Director of Development, to track and assess the performance of the planned giving program over time, including ROI.
- f. Use CBF's database and paperless document storage system to track planned giving marketing touches and actions, enter/track planned gifts, and store essential documents in partnership with Finance and other key internal departments.
- g. Maintain relationships with key contacts at third-party vendors to include those involved in the administration of life income gifts and the management of related investments, and with third-party vendors advising CBF on the reinsurance of charitable gift annuities.

- h. Maintain relationships with key contacts at financial institutions serving as expert advisors to CBF's planned giving program and institutions included on the "Preferred Provider List" shared with prospective planned giving donors who request financial advice.
 - i. Consult the Gift Acceptance Committee and other key staff when vetting proposed planned gifts, including all gifts of real estate/property. Consult with CBF's attorney(s) as needed.
 - j. Work with the finance team and third-party vendors to ensure CBF meets state regulatory requirements for issuers of charitable gift annuities in states where we choose to market and accept them.
 - k. Ensure CBF adheres to best practices regarding counting and valuation of planned gifts.
4. Other
- a. Maintain membership and/or certifications with trade associations. Participate in continuing education to build knowledge and expertise and keep abreast of current trends.
 - b. Other duties as assigned

PREFERRED PROFESSIONAL EXPERIENCE AND QUALIFICATIONS

Bachelor's degree required. Minimum of five years' experience in nonprofit fundraising. Prior experience soliciting and securing planned gifts and/or managing a gift planning program preferred. Strong interpersonal skills utilizing tact, discretion, and compassion, and maintaining a high level of confidentiality. Excellent verbal communication skills and writing skills in a variety of styles (solicitations, proposals, reports, stewardship). Experience with print and digital marketing a plus. Excellent time management skills. Demonstrated ability to recognize opportunities and identify critical, high-return activities and prioritize them to attain goals. Proficiency in computer systems, MS Office software, and CRM databases. Ability to work independently and within a team environment.

Ability to communicate effectively with people from diverse backgrounds and experiences. Ability to receive and give supportive feedback to foster equity and inclusion in working relationships. Ability to recognize, nurture, and learn from strengths in co-workers. Having flexibility to accomplish job responsibilities in several work environments, whether it be from home, on the road, or in an office.

Salary Range: \$85,000

To apply, please send resume and cover letter through job posting on CBF website no later than June 24, 2022.

CBF offers a comprehensive benefits package to include: 20 vacation days, 10 sick days, 2 floating holidays, health, vision, dental, life insurance, and a 403(b) retirement plan with matching contribution.

CBF requires that all staff be fully vaccinated against COVID-19. The successful candidate will need to submit verification of vaccination or have a valid religious or medical reason not to be vaccinated.

WE ARE COMMITTED TO DIVERSITY, EQUITY, INCLUSION, AND JUSTICE

Just as biodiversity is the key to a thriving ecosystem, human diversity is the key to saving the Bay. Success depends on people from widely diverse backgrounds, cultures, ethnicities,

identities, and races taking collective action. Clean water, clean air, and a safe environment are rights we *all* share.

To increase diversity, equity, inclusion, and justice, the Chesapeake Bay Foundation will:

- Recruit and retain a staff, board, and membership that reflect the diversity of people living within the Chesapeake Bay region;
- Strengthen and broaden the diversity of our partnerships;
- Celebrate and value the diversity of staff; and
- Fight to ensure that everyone has equal access to clean water, clean air, and a safe environment.

CBF is proud to be an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.