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| Job title Senior Gift Planning Officer | Department Donor Relations |
| Reports to Director of Donor Relations | Supervises N/A |
| FLSA status Exempt | Hours Full time |
| Date December 2024 | |

Austin Community Foundation mobilizes ideas and resources to strengthen Central Texas. We envision a vibrant and equitable community where everyone can contribute and find opportunity. ACF is committed to closing the opportunity gap in Central Texas through targeted investments in housing affordability and economic mobility.

As a trusted local partner, ACF stewards approximately \$540 million in assets in more than 1,300 charitable funds. Since its creation in 1977, the Foundation has granted more than \$570 million to nonprofits across Central Texas and beyond.

Job summary

For nearly 50 years, donors have entrusted the Foundation to carry out charitable wishes beyond their lifetime. Through this generosity, the Foundation has cemented its place as a permanent community resource that invests in wide issue areas throughout Central Texas on behalf of donors. ACF is honored to expand our commitment to donors and the nonprofit community alike by strategically increasing assets in our most impactful and effective charitable giving vehicles, including planned and non-cash gifts.

The Senior Gift Planning Officer's primary responsibility is to execute and expand the Foundation's gift planning program with the goal of securing unrestricted gifts to the Foundation that can be leveraged to respond to our community's greatest needs. Managing the planned gift portfolio and Legacy Society, the Senior Gift Planning Officer will contribute to asset building by leading conversations with donors and prospects who demonstrate an interest and ability to leave a charitable bequest or establish long-term giving vehicles.

The Senior Gift Planning Officer collaborates across the Foundation to directly support donors in documenting charitable plans, oversees the execution and administration of planned giving instruments, and contributes to the strategic development and visibility of ACF's Legacy Society program and complex asset donation capabilities. The ideal candidate is entrepreneurially minded and has a desire to build out a comprehensive gift planning program within ACF, with a concentration on working with donors to include the organization in their plans through unrestricted gifts supporting ACF's broad mission. Often engaging with donors about the most significant charitable gift of their lifetime, the Senior Gift Planning Officer should bring both superb attentiveness and technical acumen.

Essential duties and responsibilities include the following:

Portfolio Management

Prospects

- Manage and expand a portfolio of planned giving prospects focusing on securing new and increasing existing commitments from donors.
- Work with donor relations officers to identify and steward fundholders who are ready to be approached about a planned gift with the goal of securing new legacy commitments and/or non-cash asset gifts to the Foundation.
- Partner with prospective donors and their legal and financial advisors to design and execute planned giving instruments and/or secure gifts of non-cash assets.

Stewardship

- Steward a portfolio of donors who currently have documented planned gifts comprising split interest and bequest gifts, including charitable remainder trusts, designated intentions, and other estates, wills and trusts.
- Build relationships and educate current donors on the impact of unrestricted gifts to result in increased unrestricted gifts to ACF.
- Provide technical expertise on charitable giving strategies and vehicles.

Legacy Society

- Oversee ACF's community of planned giving donors, the Legacy Society, which engages and stewards individuals with a documented bequest.
- Create an identity for the Legacy Society: develop an active engagement strategy and value proposition, convene members, and strategically communicate to current members and prospects.
- Work with the Communications department and leadership to develop and execute a comprehensive communications and marketing strategy to increase Legacy Society membership, raise awareness of planned giving opportunities, and increase visibility of ACF's expertise in accepting charitable donations of complex and non-cash gifts.

Program Operations & Management

- In coordination with the Finance department, oversee gift planning administration and transfers of non-cash assets to the Foundation, including working with the appropriate internal teams for the transfer, ongoing maintenance and management of assets.
- Design internal systems and processes that build clarity and efficiency into the documentation of the gift planning process from end to end.
- Continually evaluate the effectiveness of the program by establishing metrics, tracking and reporting results, and recommending and implementing changes as needed to reach desired outcomes.
- Maintain detailed records of donor interactions and planned giving activities in the Foundation's system of record.
- Ensure compliance with all relevant regulations and ethical standards.

Leadership & Knowledge Sharing

- Develop collaborative, peer-to-peer relationships with colleagues across departments.

- Develop and execute a training program for donor-facing teams on ACF policies, regulatory and technical matters, and industry best practices related to various planned giving vehicles and non-cash asset donations.
- Provide expertise when needed to colleagues, donors, and prospective donors on issues related to gift and estate planning and development best practices.
- Attend and participate in professional advisor meetings, industry conferences, events, and networks as assigned to establish visibility for ACF and its capacity to accept and administer non-cash assets and planned gifts. Collaborate with select team to engage estate attorneys and other professional advisors involved in gift planning on behalf of ACF.
- Remain up to date on relevant tax, probate, trust and financial/estate planning practices and communicate important changes internally to impacted teams.

Other duties as assigned.

This job description is intended to be general and is expected to evolve over time. It will be reviewed periodically and updated as needed.

Job requirements and qualifications

Experience

- 5+ years of experience in development or equivalent experience within a legal, tax, or financial or estate planning practice required.
- 3+ years of successful experience in gift planning required.
- Experience in a client-facing role required.

Training requirements (licenses, programs or certificates)

- Bachelor's degree required; advanced degree and/or professional certification in law, finance, or tax planning (JD, CFP, CSPG, FCEP or CAP) preferred.
- Proficiency with standard planned giving software (ex. Crescendo, PG Calc) a plus.

Other knowledge, skills and abilities

- General understanding of technical aspects of non-cash gifts, including privately held and restricted stock, business interests, and real property. Thorough understanding of technical aspects of types of planned gifts including bequests, life-income gifts and gifts of life insurance and retirement assets required.
- Professional and personal alignment with Austin Community Foundation's mission.
- Familiarity with philanthropic ecosystem in Central Texas or desire to engage and learn.
- Understanding, appreciation, and knowledge of the prospect/donor cycle: identification, engagement, cultivation, solicitation, stewardship.
- Ability to speak effectively and persuasively and to make presentations to individuals and small and large audiences.
- Experience or desire to learn marketing techniques and best practices for planned gifts in a complex organization.
- Proven ability to work autonomously as well as part of a team; ability to handle multiple relationship situations simultaneously and navigate through a complex and multi-level organization.

- Unwavering commitment to customer service and experience providing prompt, professional responses to all inquiries through exceptional verbal and written communication skills.
- Flexibility and comfort with working through times of ambiguity and change.
- Proficient in Microsoft Office products, electronic data management, and internet software. Preferred experience with project management and workflow tools such as Asana. Foundant CommunitySuite experience a plus.
- Authentic participation in diversity, equity and inclusion education and training; commitment to diversity, equity and inclusion and to the organization's ongoing work to eliminate the opportunity gap in Central Texas.

Work environment and other information

This is not a remote position.

Austin Community Foundation offers a hybrid work environment. As a place-based organization, we expect our employees to reside in the 6-county area in which we serve and to be available to come into the office part time for in-office meetings and tasks. Employees work with their supervisors to draft their hybrid work plan.

In addition, you will be required to work full-time in the office for the first 30 days of your employment.

- Work in clean, pleasant, comfortable office setting.
- Minimal travel required.
- Attendance required at occasional after-hours or evening events.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Salary: \$100,000 per year

Workplace benefits:

Collaborative team environment

Opportunity to make Central Texas a better place for everyone

Paid time off

ACF covers 100% of employee health, dental and vision plans, basic life and AD&D insurance, and short/long term disability insurance

401(K) with employer match

Basic life insurance and AD&D

To apply for this position, please submit your resume and cover letter to Kim McCrary at apply@austincf.org. No phone calls, please. The application review and interview invitations for this position will not begin until January 2025. The position will remain open until filled.

Austin Community Foundation is committed to equal-employment principles, and we recognize the value of committed employees who feel they are being treated in an equitable and professional manner. We strive to find ways to attract, develop, and retain the talent needed to meet business objectives, and to recruit and employ highly qualified individuals representing the diverse communities in which we live.