

# Director of Gift Planning

This is a civilian position that works for a 501(c)3 non-profit that supports the Air Force Academy. This position does not require military service or graduation from the United States Air Force Academy.

## UNITED STATES AIR FORCE ACADEMY ASSOCIATION & FOUNDATION

The United States Air Force Academy Association & Foundation (“Association & Foundation”) believe strongly that the United States Air Force Academy (“Academy”) is a vital national resource, upholding the invaluable mission of developing leaders of character for our Air Force, Space Force and nation. The Association & Foundation have joined forces to accomplish their complementary missions to actively support these leaders as well as the Academy and its cadets.

The core values of the United States Air Force Academy are Integrity First, Service Before Self, and Excellence in All We Do. These same core values guide the Association & Foundation, as well as our boards and staff.

## THE OVERVIEW

The Association & Foundation, in support of the U.S. Air Force Academy, seeks an experienced gift planning professional as the Director of Gift Planning. This position will report to the Assistant Vice President of Development.

## DAILY RESPONSIBILITIES

- Understand, uphold, and promote the ethical standards and core values of the United States Air Force Academy (“USAFA”) and the Association & Foundation.
- Learn and understand how the Association & Foundation interact with the Academy and other Academy-related nonprofit organizations that support various areas of the Academy.
- Oversee and manage the Association & Foundation’s planned giving program to include the supervision of all gifts made through bequests, trusts, and other planned giving vehicles.
- In conjunction with the Assistant Vice President for Development, establish and track planned giving goals for the Association & Foundation.
- Develop and implement strategies to help the Association & Foundation reach stated goals, including prospect pool or portfolio analysis, strategy sessions, training, planned gift reporting, goal-setting and partnering directly with other gift officers on individual prospects.
- Maintain content expertise in gift planning vehicles, estate and tax planning, investing, financial planning, philanthropic planning, and economic climate.
- Working with the Marketing and Communications team, administer all marketing aspects to promote the program; prepare planned giving materials, including but not limited to correspondence, solicitation and stewardship materials, and acknowledgements; oversee production of electronic and print Legacy newsletters.; oversee production of Checkpoints ads; assume responsibility for administering the contract with the Foundation’s marketing partner for the planned giving program.
- Develop recommendations for gift acceptance policies and ensure that existing policies are followed.

- Conduct planned giving workshops – Legacy Seminars – with donors and their advisors throughout the United States.
- Administer the Association & Foundation’s planned giving recognition program, the Polaris Society, to include an annual recognition event.
- Working with the Executive Vice President for Development, support the Planned Giving Stewardship Committee of the board; develop strategies to cultivate and solicit planned and legacy gifts for the Board of Directors; develop and implement a volunteer engagement plan to support peer-to-peer solicitations by committee members.
- Assume responsibility for monitoring and reporting on documented legacy gift totals and future pipelines.
- Collaborate with major gift officers on soliciting and closing legacy gifts and provide training on gift planning vehicles.
- Perform other duties as assigned.

## **KNOWLEDGE, SKILLS AND ABILITIES**

- A minimum five years of experience in development and/or planned giving fundraising.
- Proven track record of securing six and seven-figure major and planned gifts and meeting annual fundraising targets.
- Demonstrated knowledge of planned giving vehicles (e.g., trusts, annuities, and real estate gifts), gifts of securities and other non-cash assets, charitable tax benefits, and associated legal and tax requirements.
- Strong communication skills, high attention to detail and follow-up, and excellent organizational and project management skills.
- Proven ability to manage confidential information with distinction and tact.
- Ability to work collegially and collaboratively in a team setting.
- Flexibility and adaptability to new programs in an emerging and changing environment.
- Willingness and ability to quickly learn the Association & Foundation’s internal processes and technological tools, including CRM , standard office applications, and analytical tools.

## **PREFERRED QUALIFICATIONS**

- A bachelor’s degree is required; advanced degree is preferred.
- Experience in accounting, financial planning, or law; specific knowledge/understanding of tax implications of life income and estate gifts preferred.
- Experience with Blackbaud Fundraiser Performance Platform and PG Calc.
- A valid driver’s license and any related insurances is required.
- An ability to travel to attend events and meetings within the United States which will include night and weekend work.
- Be able to pass a DBIDS Background check, which is required in order to maintain access to the Association & Foundation principal offices at the Academy.
- Individuals with service in the military, especially the U.S. Air Force, will be given strong consideration.

**COMPENSATION AND BENEFITS**

The salary range for this position is \$90,000-\$110,000. The Association & Foundation offers a competitive benefits package including but not limited to medical, dental, vision, life insurance, short-term and long-term disability, retirement and paid time off for all full-time employees.

**SUBMISSION INSTRUCTIONS**

Applicants must submit a cover letter and a resume to receive full consideration. Applications can be submitted via [https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R\\_ID=6803530](https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R_ID=6803530).

The position will remain open until filled.