

POSITION DESCRIPTION

POSITION TITLE	Associate Director of Gift Planning–California
LOCATION	California; other locations contiguous to the State of California negotiable
DATE POSTED	February 2019

ABOUT US

The Nature Conservancy is a global conservation organization dedicated to conserving the lands and waters on which all life depends. Guided by science, we create innovative, on-the-ground solutions to our world's toughest challenges so that nature and people can thrive together. We are tackling climate change, conserving lands, waters and oceans at unprecedented scale, providing food and water sustainably and helping make cities more sustainable. Working in 72 countries, we use a collaborative approach that engages local communities, governments, the private sector, and other partners. To learn more, visit www.nature.org or follow @nature_press on Twitter.

SUMMARY

The Associate Director of Gift Planning develops, implements and manages effective gift planning strategies and plans for the cultivation and solicitation in asking for, negotiating and closing outright and complex gifts of \$100,000 or more from major individual donors and prospects.

ESSENTIAL FUNCTIONS

The Associate Director of Gift Planning is responsible for developing and managing effective gift planning donor strategies for the California and Hawaii, that results in raising funds through outright, blended and planned gifts. S/he will serve as a technical and strategic gift planning advisor and partner to state leadership and fundraising staff in assigned chapters to determine effective strategies for identified donors and prospects to generate leads for complex gifts. S/he understands and applies complex principles of developing donor strategies and builds strong relationships with a portfolio of new and current donors and prospects. The Associate Director discusses assets proficiently and listens for opportunities for gifts of assets. S/he negotiates and closes a wide range of outright and complex gifts, including bequests and life income gifts, gifts of non-cash assets such as stock and real estate, and Donor Advised Funds. S/he will incorporate blended gifts and gifts of assets in proposals to donors. S/he is capable of articulating the global priorities of the Conservancy and working within a campaign at an advanced level. S/he involves and engages appropriate partners in the field and staff at the Worldwide Office, keeping them apprised of interactions, issues or concerns. S/he will be required to use the Conservancy's donor database. Understands and complies with all TNC gift-related policies and procedures and ensures ethical compliance, as defined by the Partnership for Philanthropic Planning and the Association for Fundraising. They will be required to use the Conservancy's donor database.

RESPONSIBILITIES & SCOPE

- Decisions may have program-wide impact, affect staff in non-program areas, and bind the organization financially or legally.
- Direct or participate in negotiations for complex, high profile or sensitive agreements.
- Ensure compliance with TNC policies and procedures and external (donor/legal/IRS) requirements; be alert to ethical compliance issues.
- Financial responsibility for setting and meeting fundraising objectives, evaluating results, and developing corrective strategies.
- Implement and lead multiple collaborative and complex projects, directing work of staff, managing budget, setting deadlines, and ensuring accountability.
- Maintains confidentiality of frequently sensitive and emotionally charged information.
- Maximum opportunity to act independently, resolves complex issues within scope.
- May supervise support or administrative staff.
- Persuasively convey the mission of TNC to diverse groups important to the organization's overall prosperity.
- Travel up to 50% time and on short notice, work long hours and weekends as needed.

- Participation in Legacy Club field trips with donors that includes physical activity such as hiking, kayaking and climbing
- Work environment involves only infrequent exposure to disagreeable elements and minor physical exertion and/or strain.
- Responsible for closing 30 – 50 outright, complex, and/or planned gifts annually. Responsible for 300 – 400 donor interactions and 50 visits annually. Work with donors on complex giving vehicles and assets. Annual fundraising target of \$7,000,000 or more.

MINIMUM QUALIFICATIONS

- Bachelor's degree and 8 years related experience.
- Experience building and maintaining long-term relationships with constituents such as HNW donors and prospects and donors capable of giving noncash and complex assets.
- Experience in asking for, negotiating and closing outright, blended and planned gifts of \$100,000 or more.
- Experience in managing and tracking multiple prospects and donors.
- Experience working with fundraising principles and practices.
- Experience using communication and presentation skills, and experience working with boards.
- Experience, coursework or other training in current and evolving trends in charitable giving, particularly in the areas of capital campaigns, major and planned gifts.

PREFERRED KNOWLEDGE, SKILLS & EXPERIENCE

- Multi-lingual skills and multi-cultural or cross-cultural experience are appreciated.
- Ability to inspire, motivate and marshal resources. Strong interpersonal skills, including ability to positively influence and persuade.
- Ability to design and implement fundraising strategies, including cultivation, solicitation and recognition strategies.
- Ability to determine an individual's interests, capacity and potential for helping the Conservancy meet its goals, and act appropriately to tie those interests with the Conservancy's work.
- Ability to educate and inform prospective and existing donors about appropriate giving vehicles.
- Ability to qualify donors & prepare planned gifts proposals; design cover letters for proposals; and identify options for donors.
- Advanced knowledge of complex charitable gift planning.
- Demonstrated experience using listening, diplomacy, and tact to build strong relationships and motivate donors and volunteers.
- Proven ability to negotiate complex, high profile or sensitive agreements.

FUNCTIONAL COMPETENCIES

Analysis & Problem Solving

Develops plans, tracks performance, and can identify lessons learned – Initiates innovative ways to define, understand, and address issues. Uses unique insights to develop appropriate plans, anticipating needs of audiences. Establishes and analyzes performance metrics and communicates lessons learned to inform strategies. Assesses quality, makes recommendations, and advises on use of resources. Explains data collection and analysis principles. Provides guidance on addressing challenges and obstacles to meet goals.

Organizational Agility

Serves as a resource to staff – Assists staff in developing strategies and plans based on organizational priorities and goals. Provides guidance related to procedures and policies. Builds consensus across various audiences. Anticipates business needs and applies best practices and knowledge within networks to craft strategic solutions. Understands internal and external influences on the organization.

Planning & Implementation

Creates individual objectives in alignment with plans – Develops a clear understanding of the organizational and program plans and how individual activities influence success. Applies strategic plan to short-term and long-term individual goals.

Product & Practice Expertise

Expert on specific products or practices – Institutionalizes the use of products to drive strategy choices and business decisions. Analyzes, anticipates and addresses policy and procedural issues and designs and/or revises based on changing circumstances and organizational priorities. Applies best practices and knowledge within and across networks and programs, and advocates for the use of appropriate processes. Understands and applies industry best practices to organizational processes. Applies solutions organization-wide to achieve high-level business objectives. Serves as organizational owner and sponsor of systems.

Relationship Management

Leads working relationship and takes responsibility for (donor/client) satisfaction – Directs and leads working team and/or partner relationships and consistently seeks to improve results and satisfaction. Promotes the goals, contributions and needs of the program through interactions with colleagues and stakeholders. Provides advice or mentoring regarding relationships.

Strategic Outreach

Adapts to audience and purpose – Incorporates analysis and audience insight into messaging strategies. Integrates the written, visual and design components that connect with the selected audience. Anticipates audience needs and adapts messaging to offer strategic solutions.

Training & Mentoring

Trains broad audiences and assists with the development of materials to support learning – Designs training that engages specific audience, explains difficult information in a manner focused on the perspective and level of knowledge/expertise of the audience. Connects training to the front-end use of information. Assists with the identification of core information to be shared in training and the best methods for distribution. Creates engaging presentations that communicate key messages.

HOW TO APPLY

Visit www.nature.org/careers and apply online with cover letter & resume to Job #47421 or [Apply Here](#). All resumes and **required** cover letters must be submitted through The Nature Conservancy's online application system. The application deadline is March 24, 2019 at 11:59pm EST. If you experience technical problems with the site or application process, please contact applyhelp@tnc.org and include the job opening ID.

This description is not designed to be a complete list of all duties and responsibilities required for this job.

The Nature Conservancy is an Equal Opportunity Employer. Our commitment to diversity includes the recognition that our conservation mission is best advanced by the leadership and contributions of men and women of diverse backgrounds, beliefs and cultures. Recruiting and mentoring staff to create an inclusive organization that reflects our global character is a priority and we encourage applicants from all

cultures, races, colors, religions, sexes, national or regional origins, ages, disability status, sexual orientations, gender identities, military or veteran status or other status protected by law.