

DIRECTOR OF DEVELOPMENT, INDIVIDUAL & PLANNED GIVING

Description

NOTE: Desert Botanical Garden requires all staff to be fully vaccinated by January 1st, 2022. We do have exemptions for medical reasons or sincerely held religious beliefs that would be evaluated on a case-by-case basis to determine if we can accommodate.

Position Purpose

This position exists to support the Garden's annual operations, capital projects, and endowment growth at the highest levels of philanthropy. The Director, Individual & Planned Giving, will manage a blended portfolio of individuals and families with responsibility for both major lifetime donors and planned gift prospects. The Director will work closely with colleagues and board members to support a continuum of individual donors moving from annual giving into the ranks of donors making special, major, and planned gifts.

The Director will manage all activities supporting Sonoran Circle enrollment, to include marketing legacy provisions for the Garden, managing Sonoran Circle programs and communications, and working with advisors on the Planned Giving Committee.

Essential Duties

Individual Giving:

- Manage active portfolio (approximately 150 prospects at any time in addition to Sonoran Circle members) of high-net-worth individuals and families. This combines both lifetime prospects and legacy prospects.
- Prepare research and data analysis related to giving patterns and capacity ratings for targeted prospects. Contribute regularly to tracking and progress reports on prospects.
- In collaboration with colleagues and board members, develop prospect strategies, communications, cultivation and stewardship steps to support and sustain the Garden's philanthropic base.
- Develop deferred gift strategies, where appropriate, to deliver stretch commitments beyond lifetime giving.
- Work with Individual Giving team on cultivation and fundraising events for managed prospects and donors.

Gift Planning:

- Plan, implement and evaluate planned giving marketing strategies, including printed materials, workshops, digital messaging, and other methods of outreach.
- Respond to inquiries from donors regarding planned gifts; provide gift illustrations when appropriate.

- Manage the Garden's Sonoran Circle program for legacy donors; contact and visit members personally.
- Collaborate with the Donor Events Coordinator to plan, implement and execute a variety of events (for cultivation, education and stewardship) aimed at promoting the Garden's planned giving program.
- In collaboration with Development team, create and manage strategies to identify, cultivate and solicit prospects capable of making planned gifts.
- Serve as staff liaison for the Garden's Planned Giving Committee
- Research and attend trainings on new and emerging trends in planned giving.

Requirements

- Bachelor's degree preferred or comparable combination of education and work experience.
- Minimum of 5 years of experience in fundraising, marketing, and/or trust and estates. Prior experience with major gift solicitations, individual giving, estate planning or personal banking, a plus.
- Experience with estate planning principles and all forms of outright and deferred charitable giving options.
- Strong interpersonal skills, ability to establish effective relationships with prospects, donors, staff and board members and professional advisors.
- Strong computer skills, including Microsoft Office, CRM database, preferably Salesforce and planned giving software, preferably Crescendo.
- Excellent communication skills, both oral and written, as well as comfortable giving presentations to various audiences.
- Ability to work independently and to take initiative.
- Strong attention to detail.
- Experience working with volunteers for fundraising initiatives.

Equipment Used

Typical office equipment.

Internal Communication

Frequent interaction with all Garden employees.

External Communication

Regular communication with Garden employees, donors, potential donors, trustees and others. This could be in person, via telephone, and/or email.

Working Conditions

No physical effort beyond what is typically required in a normal office environment. Time periods of high workload may require additional hours. The noise level in the work environment is usually moderate.

Must be able to walk, sit, stand, stoop, kneel, bend, see, hear, speak, read, and type. Manual dexterity and the ability to lift up to 10 pounds required.

Diversity, Equity, and Inclusion

Desert Botanical Garden is an Equal Opportunity Employer and considers all applicants without regard to race, religion, color, sex, gender identity and/or expression, sexual orientation, marital or parental status, age, national origin, veteran status, disability, or any other status protected by law.

The Garden fosters and supports workplace diversity, equity, and inclusion to honor the unique perspectives, experiences, and contributions of all, to celebrate successes, and to cultivate individual and institutional excellence. All employees will help add to the Garden's diversity and fully embrace it.

This job description is not intended to be an exhaustive list of all duties, responsibilities, and deliverables of the role. This is not a contract and should not be viewed as such. Other duties may be assigned by supervisor and/or his/her designee.

Pay Range \$80,000-\$90,000