

POSITION PROFILE

VICE PRESIDENT OF PLANNED GIVING AND DONOR SERVICE

OUR COMMUNITY

CFCV is headquartered in [Columbus](#), Georgia's second-largest city and located 100 miles southwest of Atlanta. The Columbus Region is centered around its proximity to the mighty Chattahoochee River, which connects downtown Columbus and Phenix City, Alabama, and features the world's longest urban whitewater course. Home to Aflac, Char-Broil, and Synovus, some of the greatest companies in the world started here. Find out what it's like to [work in Columbus, GA](#).

Philanthropy has a deep tradition in this community; we pride ourselves on our public/private partnerships that strengthen our economy and provide a rich quality of meaningful life. Recent projects include the allocation of more than \$100 million to fund cultural arts projects, vital infrastructure support, the 22-mile RiverWalk, and the RiverCenter for the Performing Arts. Over the last decade, the region has experienced the benefits of more than \$2.8 billion in new capital investment and 18,000 new jobs.

Our communities are vibrant and friendly. Stroll through one of our farmers' markets on the weekend and you'll see. Our Uptown and whitewater park is one of the best in the nation. We have amazing schools, world-class museums, celebrated arts & culture, and a buzz-worthy restaurant scene. If you want to be part of the next amazing city in the Southeast, look no further. In Columbus, our [cost of living](#) index is well below the national average at just 74.4. You'll find you can enjoy an exceptional quality of life along with everything that comes with it.

OUR ORGANIZATION

The [Community Foundation of the Chattahoochee Valley](#), (CFCV) is a \$300-million organization that makes some \$18 million in grants annually. In its 25 years of history, the organization's investments have generated more than \$110 million in net philanthropic value for its more than 350 charitable Funds. The organization's mission is to "enable and promote philanthropy that inspires, facilitates, and fosters a vibrant and engaged Chattahoochee Valley." As the premier center for thoughtful philanthropy for people who want to make their Chattahoochee Valley communities better, both during and after their lifetimes, CFCV serves 11 counties in Georgia and two in Alabama.

JOB SUMMARY

The **Vice President of Planned Giving and Donor Service** works to enhance this community's charitable resources in a manner consistent with the mission of the Community Foundation (CFCV). This position is responsible for working with the President/CEO in the asset development and promotional efforts of the organization. A primary focus is meeting the needs of new and existing donors and fund representatives, including ensuring that their work is in accordance with established legal and operational best practices of the field and developing "raging philanthropists." The position also includes communicating CFCV's opportunities to the wealth advisor community, and broadening CFCV's services to its donor community by identifying and developing new ways to serve.

By connecting new and existing contributors to the work of the CFCV, the **Vice President of Planned Giving and Donor Service** plays an important role in growing philanthropic resources for our community. Generating charitable opportunities among these constituents requires an experienced, highly motivated, and reliable professional who possesses excellent communication and organizational skills.

PRINCIPAL DUTIES AND RESPONSIBILITIES

- Partner with the President/CEO to market CFCV's services to 1) increase assets under management and 2) deepen and improve service to existing donors.
- Ensure that area wealth advisors know and understand the opportunities that CFCV offers their clients to maximize tax-wise charitable planned gifts.
- Capture, communicate and document donor intent, including drafting Fund Agreements and amendments. Ensure that Fundholders are well-oriented to CFCV and their Funds.
- Develop and manage programs to build relationships with current and potential donors, using current planned gift tools and tax strategies to optimize their donations. Periodically measure donor satisfaction.
- Oversee CFCV's donation receipt procedures, ensuring high levels of industry and legal standards, donor satisfaction, and operational accuracy.
- Assume primary responsibility for donor-related data maintenance in CFCV's software system, CommunitySuite (Foundant Technologies).
- Research legal and operational issues and recommend CFCV compliance as necessary.
- Represent CFCV at community, donor, philanthropic and professional advisor functions.

GENERAL INFORMATION

The **Vice President of Planned Giving and Donor Service** reports to the President/CEO and is an FLSA exempt position.

The above statements are intended to describe the nature and level of work to be performed by the person in this position. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of the job.

Projected start date for this position is: February 12, 2024, or earlier.

The Community Foundation does not discriminate on the basis of race, color, national or ethnic origin, age, gender, religion, medical condition, veteran status, marital status, sexual orientation, or any other characteristic protected by law.

QUALIFICATIONS AND SKILLS

- Education: Bachelor's degree. Advanced degree a plus, as are advanced industry certifications such as CSFRE, AEP, CTEP, etc.
- Experience: At least five years of professional experience in the legal, financial services, or gift planning and donor stewardship (not simply annual fundraising) field. This experience should consist of cultivating, soliciting, and stewarding clients. Nonprofit experience at the board or staff level is a plus.
- Professional record for providing client services while adhering to very high standards of service excellence, responsiveness, and integrity.
- High levels of curiosity, self-motivation, and skills for creative problem-solving. Demonstrated high level of initiative and responsibility to enable management and coordination of multiple projects simultaneously.
- A proven ability to effectively interact with people at all income levels, community leaders, professional advisors, and non-profit representatives.
- A record of deep discretion with highly sensitive and confidential information. Demonstrated ability to work with a diverse donor and prospect population.
- The ability to take a proactive role in team efforts, promote cooperation and collaboration between team members, and encourage open communication.
- Superior verbal and written communication skills. The ability to present effectively to small and large audiences. A commitment to ongoing professional development.
- Hands-on technology skills sufficient for organizational and productivity effectiveness in a small-staff environment with limited administrative support. Database experience, proficiency in Microsoft Office Suite with an eagerness to learn the Foundant Technologies suite of products.
- Knowledge of and commitment to the Chattahoochee Valley and its nonprofit sector a plus.

COMPENSATION AND BENEFITS

Base salary range: \$130,000 - \$175,000 annually, with benefits package including but not limited to health insurance, 401(k) contributions, paid holidays, and paid time off.

Individual compensation packages are based on various factors unique to the candidate's experience, including skill set, qualifications, and other job-related reasons.

DEADLINE TO APPLY IS JANUARY 10, 2024

Interested candidates are required to submit a letter of interest, resume/CV, and salary requirements. Any materials received incomplete will be returned.

Interested candidates should email materials to:
Anissa Starnes, IOM
Executive Recruiter
CFCV@ygmexecutivesearch.com

No phone calls or visits to CFCV, please.