

## Job Announcement



### Executive Director of Planned Giving

- Location:** Hybrid work within commutable distance from CARE Offices either in Atlanta (preferred), San Francisco, or New York.
- Reporting to:** Associate Vice President, Philanthropy
- Manages:** Team of 5 planned giving professionals
- Annual salary:** \$150,000 to \$180,000, depending on qualifications and location.
- Contract Type:** Permanent Contract
- Working hours:** Full time – Hybrid work
- Candidate level:** Senior role - Management

#### **Background**

[CARE](#) works around the globe to save lives, defeat poverty, and achieve social justice. We seek a world of hope, inclusion, and social justice, where poverty has been overcome and all people live with dignity and security.

CARE puts women and girls in the center of our efforts because we know that we cannot overcome poverty until all people have equal rights and opportunities.

At the end of World War II, American charities banded together to send food rations to Europe that became the world's first CARE Packages, and an American symbol was born. For over 75 years, CARE has led the way to a better life for the world's most vulnerable people. This year, CARE and partners worked in [111 countries](#), reaching more than 174 million people around the world through 1,600 projects.

### **Purpose of Role**

The Major Gifts and Planned Giving program for CARE is responsible for securing over \$70 million annually from generous philanthropists to combat poverty and respond to humanitarian crises worldwide. Reporting to the Associate Vice President of Philanthropy, the Executive Director will provide strategic leadership to advance all aspects of CARE's planned giving program and supervise and mentor a team charged with growing CARE's long-term planned giving revenue. This senior fundraiser also manages a small strategic portfolio of high-value planned gift prospects and donors for cultivation and solicitation.

This is a rare opportunity for an accomplished planned giving fundraiser, expert manager, and confident leader to join CARE's high-performing resource development team in a senior role. The ability to serve as a valued partner and effective driver for CARE's continued growth and evolution in the planned giving space is essential. Candidates who bring the requisite experience and qualities necessary to help realize CARE's ambitious philanthropic goals are strongly encouraged to apply. This position is hybrid in nature, and candidates can be based within commutable distance from CARE offices in any of the following cities: Atlanta (preferred), San Francisco, or New York.

### **Primary Responsibilities:**

- Develop, implement, and oversee a comprehensive planned giving program that reflects industry best practices and advances CARE's mission and goals.
- Lead and manage a team of 5 planned giving professionals, setting clear performance expectations and offering frequent feedback and coaching to achieve outcomes.
- Oversee a robust bequest administration operation, monitoring progress on a large volume of estates and trusts to ensure that CARE receives its full entitlement. Engage with legal, finance, and other advisors as needed.
- Supervise the management of the 1,000+ donors in planned giving portfolios, including active stewardship of Legacy Society members. Manage a small personal portfolio of high-value prospects and donors.
- Work cooperatively and collaboratively with CARE leadership and major gifts fundraisers to secure legacy/leadership gifts and blended gift commitments. Help train and mentor fundraisers in legacy planning techniques and strategies.
- Lead planned giving marketing efforts in partnership with the Chief Individual Fundraising Officer, handling vendor and agency relationships to orchestrate an active marketing program.
- Monitor and analyze internal results and external trends. Provide regular reporting for key performance indicators, planned gifts, and expectancies. Refine business rules, systems, and procedures to improve workflow, data integrity, and efficiency.
- Oversee planned giving budget. Provide analysis and calculations for revenue and expense projections.

## **Profile**

- Bachelor's Degree.
- At least 10 years of fundraising experience in planned giving with increasing levels of responsibility and supervisory experience required. Experience with leadership and capital campaigns highly desired.
- Commitment to the mission of CARE and passion for mentoring fundraising professionals.
- Ability to serve as a resource to a team of 20+ major gift officers on planned giving vehicles, current trends in philanthropy, and basic estate and financial planning, including the tax implications of charitable giving.
- Ability to meet deadlines, manage multiple responsibilities and priorities and achieve impact and results under pressure.
- Strong interpersonal and relationship-building skills. Evidence of strong analytic skills and strategy development.
- Comfort and fluency with Salesforce or other fundraising CRM.
- Experience with PG Calc, Crescendo, or similar planned giving software.
- Willingness and ability to travel to meet with donors, visit CARE field offices and projects, and attend events, staff meetings, and retreats as needed.

## **To apply for the post**

Please send a letter of application stating the skills and motivation for the post with your CV/resume (no photos) in strict confidence by email only to: Karem Armstrong at [Karem@darylupsall.com](mailto:Karem@darylupsall.com)

Please ensure that they are sent as Word or PDF documents with the titles “*your name cover letter*” and “*your name CV*”. Please put “**CARE- Executive Director of Planned Giving**” in the email subject line. Also please let us know where you saw the post advertised.

**The deadline for application is February 26<sup>th</sup>, 2023**

*Daryl Upsall International actively promotes equality, diversity, and inclusion. In recruiting candidates, we seek candidates with the proven skills required; irrespective of race, gender, religion or belief, age, disability or sexual orientation.*