



Job Title	Responsible To	Date Approved
Development Director	President & CEO	September 2022

POSITION SUMMARY

Supports the Community Foundation's mission to inspire charitable giving to invest in a brighter community as a key member of our executive team, and as an ambassador for the organization. The Development Director leads the Foundation's new donor development efforts in close coordination with the CEO. Primary responsibilities include oversight of a comprehensive program to identify, cultivate, and steward new and existing donors by facilitating outright and planned gifts that fulfill donors' charitable goals while strengthening our quality of life in north central Wisconsin.

MAJOR RESPONSIBILITIES

Asset Development

- Work with the CEO and the board of directors to develop a comprehensive asset development plan
- Work closely with the CEO and board of directors to spearhead the Foundation's efforts to identify, cultivate, and steward new donors
- Oversee the strategic and administrative aspects of the Foundation's development/gift-planning efforts
- Establish annual development goals and objectives; track staff and volunteer activity, and productivity
- Develop and oversee a charitable gift annuity program - prepare documentation, including tax calculations, relating to new and/or established gift annuities; coordinate recording and reporting
- Lead and coordinate the work of the Board's Development Committee, under the direction of its chair
- Report to the Foundation board, the CEO, and/or appropriate committees regarding development activities
- Communicate effectively to engage, inform and inspire diverse constituencies and audiences
- Anticipate change and develop new systems, strategies and innovative tactics needed to thrive in the midst of organizational and community growth

Donor Relationships

- Build and sustain trust-based relationships with internal and external stakeholders
- Engage with fund holders and donors to help maximize the impact of philanthropy on the causes that matter to them
- Prepare appropriate correspondence, documentation, and records relating to donor intent and goals
- Provide leadership on administrative aspects of development and gift-planning efforts, including proper documentation of charitable funds and gift plans; recording and analysis of prospect and planned gift information; and generation of acknowledgement letters for extraordinary gifts, such as those establishing charitable funds, involving non-cash assets, or reflecting estate provisions
- Monitor, interpret, and disseminate information about relevant tax and legal developments to staff, professional advisors, donors, and local non-profit organizations
- Assist agency fund holders with gift acceptance and provide ongoing education around accepting non-cash gifts through the Foundation
- Assist with gift planning sessions for staff, agency fund holders and affiliates

Special Events

- Participates with the team in planning and executing special events such as:
 - ◆ Donor Recognition Events
 - ◆ George L. Ruder Forum
 - ◆ Professional Advisors Seminars
- Assist with special projects as planned or requested by the CEO



Legacy Society

- Listen for opportunities to encourage membership in Legacy Society among eligible donors
- Maintain regular contact with members

New Relationship Focus Areas

- Nurture relationships with professional advisors, resulting in their willingness to allow their clients to utilize the Foundation with their assets
- Develop giving programs with local businesses, whose employees will give to their ownwill company-matched Foundation donor advised fund
- Focus areas may change from time to time

Regional Community Partners

- Assist community leaders in regional communities with their development efforts

QUALIFICATIONS & REQUIREMENTS

- Highest level of professionalism, integrity, and ethics
- Passion and commitment to the people and communities of North Central Wisconsin
- Excellent oral, written and interpersonal communication skills
- Knowledge of outright and planned gift fundamentals, and financial and legal aspects of charitable giving
- Proven track record of success and demonstrated results
- Patience, flexibility, open-mindedness, and a sense of humor
- Highly motivated with strong attention to detail and organization
- Ability to work independently and as part of a team
- Investment knowledge a plus

EDUCATION AND/OR EXPERIENCE

- Minimum of a B.A. degree in business, marketing, finance, development, non-profit management, or a related field and at least five years' experience working in development, planned giving, sales/customer service, finance, or a related field