

SUMMARY

The Charitable Gift Planning (CGP) Associate supports revenue-generating activities for the North Texas Community Foundation (NTCF). This position plays a key role in advancing the mission of NTCF as a member of the Philanthropic Services (PS) team, which is focused on growing resources for regional good, stewarding and supporting the Foundation's fundholder families and creating and sustaining philanthropic partnerships and collaborations.

The CGP Associate reports to the Director of Charitable Gift Planning (Director) and supports the team's focus on prospective fundholders and professional advisors (PA). This includes responding to inquiries when appropriate, preparing meeting presentations and prospecting materials, and managing the prospect pipeline and related activities.

The CGP Associate operationalizes the work of the Charitable Gift Planning team. The CGP Associate uses databases to keep the team on track to perform outreach and relationship management for fundholder prospects and the professional advisors whose referrals help the Foundation grow. The CGP Associate maintains the fund agreement files for prospective fundholders and is responsible for tracking prospects through the development cycle. They support the efforts of the Director, the President, and the CGP team, as needed.

This role requires excellent listening, written, interpersonal and verbal communications abilities, refined customer-service skills, high attention to detail, strong planning, organization, and project management skills, and excellent teamwork abilities.

MAJOR AREAS OF RESPONSIBILITY

- Manages fund agreement templates, keeping them updated and filed correctly.
- Makes approved edits to fund agreements and amendment templates.
- Runs monthly reports from the fund database and utilizes that data to track Key Performance Indicators (KPI) that define success for the CGP team.
- Generates and mails weekly gift acknowledgment letters to donors and documents donor files.
- Utilizes database tools to maintain an appointment log and list of referrals for prospects and track CGP activity during outreach campaigns, as defined.
- Ensures timely and appropriate response to prospect calls and professional advisor inquiries.
- Utilizes the customer relationship management (CRM) database to track prospective fundholder and professional advisor activity from identification and initial cultivation through their lifecycle as a Foundation contact.
- Collaborate with the Database Coordinator to add prospect research documents to CRM profiles, and to perform research in preparation for prospect and PA meetings.
- Oversees and maintains the Gift Law Pro (Crescendo) subscription, and schedules, sends, and reports on the results of monthly e-newsletter distribution.
- Collaborates with the Foundation's Events Coordinator to plan events that have a business development function. This includes RSVP tracking and providing requested presentation materials as needed.

- Partners with the Director to create clear and effective presentations that adhere to the organization's brand and messaging guidelines.
- Generates and mails annual solicitation letters for NTCF supporters. Tracks gifts received as a result of this annual mailing.
- Edits and updates department procedures in collaboration with the Director.
- Other duties as assigned.

QUALIFICATIONS, EXPERIENCE, AND SKILLS

- Bachelor's Degree and 2-3 years of relevant professional experience; or equivalent combination of education and relevant experience
- Professional demeanor with a positive attitude for interfacing with visitors, Board members, and staff, and proven ability to maintain confidentiality
- Highly organized self-starter with strong project management skills and a focus on timeliness, accuracy, and troubleshooting
- Outstanding verbal, written, and presentation communication skills including attention to detail
- Proficient in MS Word, MS Excel, MS Outlook, Adobe Acrobat, PowerPoint, and internet browsers
- Experience with CRM databases a plus
- The ability to work with others to accomplish the mission of the Foundation
- High level of personal and professional integrity and ethics

Salary Range: \$50-\$55K annually.

To Apply

A cover letter and resume should be directed to Amanda Lewis, Director of Charitable Gift Planning at alewis@northtexascf.org. Please reference "Charitable Gift Planning Associate" in the subject line of your email.