

# Job Description: Director of Philanthropic Services

## **Organization**

Baltimore Community Foundation is a philanthropic foundation created by and for the people of Greater Baltimore, where many donors join together to make the region they love a better place, today and for future generations. With assets over \$255 million comprised of nearly 900 charitable funds, BCF has granted over \$600 million since its inception in 1972 and is one of the Baltimore region's top grantmaking foundations. Our mission is to inspire donors to achieve their charitable goals from generation to generation and to improve the quality of life in the Baltimore region through grantmaking, enlightened civic leadership and strategic investments. Our action agenda organizes grants, initiatives and advocacy around this vision. The values that guide our work are trustworthiness, inclusion, and entrepreneurialism. In 2017, the Board of Trustees affirmed a strategic direction guided by its core elements of donors, community engagement and programmatic efforts and informed by a commitment to develop a framework that advances race, equity and inclusion to achieve BCF's vision of a Baltimore that boasts a growing economy where all have the opportunity to thrive.

## **Position**

The Director of Philanthropic Services works closely with the Vice President of Philanthropy to provide high-level stewardship and support for major fundholders and is responsible for the identification, cultivation and stewardship of planned and major gifts. This position will be the primary contact for various specialized funds and work closely with Development and Donor Services staff on delivering expanded donor services to select fundholders. The Director of Philanthropic Services is also responsible for the expansion and stewardship of BCF's relationships with professional advisors (i.e., attorneys, wealth and financial advisors, trust officers, life insurance professionals and accountants).

## **Responsibilities**

- Gift Planning – Respond to inquiries from prospects, donor representatives and professional advisors regarding current and planned gifts. Help with professional advisor and donor research. Draft and prepare fund agreements, obtain documentation and work with donor services and the finance department to ensure completion of all paperwork. Maintain a high level of expertise regarding state and federal income, estate and inheritance taxes, gift and estate giving methods and the legal aspects of charitable giving.

- Major Donor Prospect Management – Assume a portfolio of existing major fundholders and specialized funds for stewardship. Provide expanded donor services to fundholders who seek specialized support for their charitable giving. Identify prospects for cultivation and engagement with a goal of encouraging new charitable funds, support of BCF, its grantmaking and initiatives and the development of legacy gifts.
- Professional Advisors – Educate professional advisors about BCF’s services and charitable giving options through in-person meetings. This will include large and small group sessions. Promptly and accurately respond to professional advisor requests for information about BCF services and charitable giving options. Expand and update BCF’s database of professional advisors; identify new advisors and track contacts with advisors and client referrals. Serve as liaison to company who hosts BCF’s planned giving website.
- Gift Acceptance – Under the direction of the CEO and Vice President of Philanthropy, engage and serve as primary contact with legal counsel on issues related to unusual or complex gifts. Update the gift acceptance policies as needed.
- Special Events – Participate in recognition events for professional advisors and legacy donors. Help design and participate in targeted prospective donor and professional advisor educational programs. Participate in other BCF events as needed.
- Develop and maintain printed and online marketing materials and communications for professional advisors and BCF charitable giving. Contribute to BCF publications and marketing materials by providing data, reports, content and proofreading as needed.
- Participate in the creation of annual development department plans, goals and strategies.
- Attend staff meetings and serve on internal committees as appropriate.
- Represent BCF at meetings and events which may occur during or outside of normal work hours.
- Perform additional duties as assigned.

### **Qualifications**

- Bachelor’s degree required; MBA or JD preferred
- Minimum of three to five years of experience in planned giving or related financial or legal fields
- Advanced certification desired (CFP, CFRE, CSPG, AEP, CAP)
- Understanding of estate planning, income, capital gain and estate tax issues

- Ability to initiate conversations with professional advisors and prospective and current donors
- Ability to speak to groups of individuals from various professions and backgrounds
- Advanced computer skills, to include Word, Excel, Outlook and Raiser's Edge
- High level of diplomacy skills
- Maintain confidentiality and use good judgment, discretion, decision-making and professional and ethical work standards within a fast-paced environment
- Project a positive, helpful attitude and a commitment to customer service in all internal and external interactions
- Ability to plan, prioritize and organize internal and external stakeholders to achieve goals
- Excellent written, oral, and interpersonal communications skills.

### **To Apply**

The Baltimore Community Foundation is an equal opportunity employer and seeks a diverse pool of candidates in this search. We strive to be trustworthy, inclusive and entrepreneurial in all we do.

We offer a competitive compensation package including benefits such as health, vision and dental insurance, retirement contribution and match, tuition reimbursement, life insurance, disability insurance, charitable match, flexible spending account, employee assistance program and more.

To apply, please submit a resume and cover letter by clicking here:

<https://baltimorecommunity.applicantstack.com/x/apply/a2erubrx33p5/aa0>

*Direct calls and/or unsolicited third-party endorsements are strongly discouraged. No professional recruiters please*