



Job Title:	Senior Director of Gift Planning (\$110,000 - \$130,000 DOE)	Reports to:	Chief Strategy Officer
Department/Division:	Gift Planning and Marketing	Direct Reports:	Director of Development
Status:	Full Time - Exempt	Date:	May 2024

Mission:

To ignite generosity that transforms lives and communities.

Vision

Vibrant and sustainable communities where every person has the opportunity to thrive.

Office Culture Statement:

At Innovia Foundation, we invest in our staff and create an empowering and innovative work environment.

- We are passionate about serving our communities.
- We trust and treat each other with honesty and respect.
- We support, inspire and encourage each other.
- We are accountable to ourselves and each other.
- We respect our colleagues by being present and having direct and open communication.
- We are intentional in our interactions.
- We have a deep commitment to equity internally and throughout our region.
- We celebrate our successes.

About Us:

Innovia Foundation ignites generosity that transforms lives and communities. We envision vibrant and sustainable communities, where every person has the opportunity to thrive. As the community foundation for Eastern Washington and North Idaho since 1974, we partner with people who want to make our part of the world better.

We believe that generosity is the most powerful source of positive change to achieve our shared goals and values. We partner with generous individuals, families, businesses and organizations to address our region’s most pressing causes and greatest opportunities. We offer innovative products and giving solutions to catalyze greater impact and inspire donors to take a more active approach to philanthropy.

We thoughtfully collaborate with community leaders and stakeholders to build and strengthen relationships, so that our work is more reflective of and relevant to the priorities of our region. We are committed to being present and engaged, learning about community needs and supporting community momentum. We work together to address and solve our region’s problems, help those in need, identify and respond to our greatest opportunities, and leave a lasting impact.

The Innovia team is made up of people with different strengths, experiences and backgrounds who share a passion for investment in the promise of our region. We are deliberate, intentional and purposeful about the kind of culturally diverse team we are building.

Each year, Innovia invests nearly \$10 million into our communities through grants and scholarships.

If you're someone who...

- Is **mission-driven** and embraces **collaboration**, open community and constructive team partnerships
- Shows up with a **sense of purpose, heart and authenticity**
- Is adept at **project management** and **detail** work, who genuinely thrives on providing the best **team support** possible
- Is compelled by your innate **curiosity and love for learning** to dig deep, research and explore new perspectives and ideas

... then we have an exciting and rewarding opportunity for you!

We welcome you on this journey to improve people's lives and make our world a better place!

Position Summary:

Are you looking for a rewarding career fueled by purpose? Do you want our region to be the best it can possibly be? Place, purpose and innovation drive our mission, so Innovia Foundation may be the place for you. As the region's leading community foundation and one of the most prominent in the nation, we serve 10 counties in Eastern Washington and 10 counties in North Idaho.

We bring together:

- *Donors – Supporting causes and organizations that improve our community.*
- *Nonprofits – Delivering experiences that improve people and place.*

The Senior Director of Gift Planning reports directly to the Chief Strategy Officer and will work collaboratively with the entire Gift Planning and Marketing Team, the Regional Engagement Team, and across the organization.

The Senior Director of Gift Planning should be a champion of planned giving and is responsible for managing Innovia constituents in gift planning cultivation and stewardship; stewarding existing donors and cultivating prospective donors for legacy gifts, multi-generational charitable funds, and planning for complex charitable gifts, while maintaining strong relationships with Innovia staff, local community leaders and the professional advisor community.

This position oversees all aspects of the gift planning process for Innovia, including developing the strategy and implementation for the cultivation, solicitation and stewardship of Innovia prospects and donors, including engagement with the estate planning and tax advising community. This position also provides educational opportunities to Innovia staff and external constituents regarding deferred gifts and changes in tax laws. In addition, this position oversees

the Gift Planning team and the work of the Director of Development, providing oversight to the estate administration process.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

Duties and Responsibilities:

- Identifies, researches, cultivates and solicits qualified planned giving prospects, current donors and fund holders for their potential to establish significant planned gifts.
- Serves as Innovia's principal liaison with professional advisors and Legacy Society members, with the ultimate goal of developing referrals and obtaining planned gifts from Innovia's current and prospective donors.
- Serves as the lead for inquiries for and administration of complex gifts including, but not limited to, life insurance policies, real estate, privately held securities and other assets.
- Works creatively with current and prospective donors and their advisors to create charitable gifts that meet each donor's financial, estate planning and charitable goals and align with Innovia's strategic priorities.
- Implements and oversees the development of a planned giving stewardship program for Innovia's Legacy Society members, in partnership with donor relations and the executive leadership team of Innovia, to ensure meaningful engagement and retention.
- Develops and implements an annual communication strategy for outreach to prospective planned giving donors and professional advisors.
- Meets with planned giving donors bi-annually to confirm planned gift agreement is still current and makes necessary updates to documentation. When appropriate, facilitates values-based activities with donors to refine planned gift agreements and align documentation with donors' values.
- Implements an annual plan for the cultivation and education of professional advisors of all racial backgrounds within Innovia's 20-county region, which includes representing Innovia at advisor and prospect events, conducting individual and group meetings, offering education presentations, and publishing digital and print-based marketing materials to increase referrals.
- Participates in estate planning councils and other advisor organizations to cultivate relationships with professional advisors and increase estate planning knowledge.
- Develops and executes strategies to engage donors, prospects, and volunteers of color to advance Innovia's commitment to Racial Equity and Inclusion.
- Research nonprofits, community needs and area of interest grantmaking funds, in collaboration with Innovia's Community Impact team.
- Meets regularly with team members to review activities with donors, prospects and professional advisors to determine strategies for engaging them in conversations related to estate planning, long-term charitable tax planning and multi-generational charitable planning.
- Delivers educational presentations and marketing materials to promote charitable giving and the benefit of Innovia to staff, the Board, Legacy Society members, current and prospective donors, nonprofit organizations and professional advisors.

- Engages in volunteer management work, including preparing for and presenting at Gift Planning and Marketing Committee meetings and working with Innovia volunteers, as requested.
- Collaborates with the Finance, Operations, Community Investment/Grants and Regional Engagement teams to track planned gifts, support realized gifts, and other relevant data. Establishes, monitors and reports on annual planned giving goals and metrics, as needed or requested.
- Documents all meeting notes, intentions, planned giving promises, follow-up requirements and contact reports.
- Mentors colleagues in planned giving conversations.

Education/Experience:

- Bachelor's Degree in related field required, such as finance, accounting, marketing or law; a Graduate degree or special certification (e.g., JD, CTFA, CPA, CFP, CAP, CFRE) strongly preferred.
- Seven (7) or more years of experience in estate or financial planning, charitable fund development, cultivation of professional advisors, donors or institutional advancement, corporate philanthropy or philanthropic advising required.
- Experience in the cultivation and securing of major and planned gifts or experience working with high-net-worth clients in an advisory or sales environment required.
- Community foundation experience preferred.

Additional Competencies and Qualifications:

- Demonstrated knowledge and skills in planned giving, estate planning, tax laws, regulations and processes related to professional advising and charitable giving.
- Demonstrated understanding of trusts, wills, and other estate planning vehicles and charitable options.
- Knowledge of laws, regulations and processes related to nonprofit operations.
- Demonstrated ability to develop strong and credible relationships with donors/clients.
- Demonstrated commitment to diversity, equity and inclusion and experience working effectively with individuals from diverse backgrounds.
- Excellent interpersonal, analytical and organizational skills, and capable of working effectively with senior management, leadership volunteers, staff members consultants and donors/prospects.
- Strong project management competencies, including organizational and problem-solving skills, strong skills in time management, and attention to detail.
- Ability to think strategically and creatively in a collaborative environment and build successful fundraising strategies for growth.
- Ability to communicate effectively, verbally and in writing, with excellent public speaking skills, and the ability to diplomatically provide feedback, offer suggestions, insight, advice and recommendations to legacy donors to best support their philanthropic goals.
- Proficient in Microsoft Office Suite applications (i.e., specifically Outlook, Word, Excel, PowerPoint), web-based applications (i.e., Zoom) and Salesforce.
- Self-motivated and able to work independently and with colleagues as a member of a team.
- Skilled and excited to build trust with donors by listening, asking questions, responding to feedback and building authentic relationships.
- High level of integrity and ethics, personal warmth and sincerity.
- Ability to work with sensitive information and maintain complete confidentiality.
- Ability to work in a fast-paced environment, while remaining focused, detailed and results-oriented

- Ability to meet deadlines and juggle multiple tasks, be organized and effective, self-directed, while maintaining priorities
- Supervisory experience preferred.

Physical Abilities:

Primary functions require sufficient physical ability and mobility to:

- sit for prolonged periods of time;
- walk;
- operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard;
- utilize verbal and written communication to exchange information
- clearly see 20+ feet, with or without corrective lenses and differentiate between colors
- occasionally stand, stoop, bend, kneel, crouch, reach, and twist;
- climb stairs;
- lift, carry, push, and/or pull up to 20 pounds

Mental & Other Skills/Abilities:

- **Adaptability:** ability to adapt to changes, delays or unexpected events in the work environment; ability to manage competing demands and prioritize tasks; ability to change approach or method to best fit the situation.
- **Interpersonal Skills:** ability to develop and maintain positive working relationships and teamwork both inside and outside the organization while effectively handling internal pressure.
- **Dependability:** ability to follow instructions, both in written and verbal format; ability to respond to management direction; ability to complete tasks on time or notify the appropriate person with an alternate plan when necessary.
- **Judgment:** ability to make prudent and timely decisions; ability to exhibit sound and accurate judgment; ability to explain reasoning for decisions.
- **Language Ability:** ability to read and write reports, business correspondence and procedure manuals; ability to effectively present information and respond to questions from management staff, clients, customers, and the general public.
- **Mathematical Ability:** ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- **Problem Solving Ability:** ability to identify and/or prevent problems before they occur; ability to formulate alternative solutions to problems when necessary; ability to transfer learning from past experiences to new experiences of similar nature.
- **Quality Management:** ability to complete duties, on time and with precision; ability to edit the accuracy and thoroughness of one's work as well as the work of others; ability to constructively apply feedback to improve performance, ability to generate ideas to improve and promote quality in work
- **Reasoning Ability:** ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form; ability to work through problems involving multiple variables.

Work Environment:

The employee is exposed to typical office environment conditions and noise levels.

To apply, please submit a cover letter and resume to Lauren Autrey, Chief Financial & Operating Officer via email at lautrey@innovia.org or mail at 818 W. Riverside Ave., Ste. 650 Spokane, WA 99201.