



In its 23rd year, Essex County Community Foundation (ECCF) inspires philanthropy across the 34 cities and towns in Essex County, Massachusetts. We do this in three vital ways:

1) Managing and investing donor's charitable assets; 2) Strengthening and supporting local nonprofits with the knowledge and financial resources needed to sustain lasting impact; 3) Bringing organizations together and to invest in "systems-change" work that addresses root-causes of social issues in our region.

With over \$110 million in charitable assets, the Foundation advises fundholders on giving strategies to reach their philanthropic goals and maximize their impact. Our family of 250 (and growing) charitable funds delivers over \$7 million to nearly 9,000 grantees annually.

ECCF has experienced significant growth in the last five years, proving there is real need and opportunity in the regional charitable giving sector.

ECCF is seeking an enthusiastic and results-oriented professional to join its asset development team. The *Gift Planning & Advisor Relations Manager* will provide charitable gift planning and support to Essex County donors and build deep relationships with professional advisors as key stakeholders and donor referral sources.

Candidates should have a passion for supporting the nonprofit sector and a genuine interest in facilitating conversations about charitable giving with donors and advisors. Experience in a fundraising role is favored and familiarity and/or experience in the financial services industry, while not required, is preferential.

**Consider applying if you can answer YES, with enthusiasm, to these questions:**

- I enjoy the challenge associated with a role that requires both autonomy and a commitment to teamwork.
- I am successful in building genuine relationships with people from all backgrounds and lived experiences and am energized by meeting with individuals and groups as a core element of my work.
- I thrive in a work environment that values an entrepreneurial spirit and individual accountability.
- It's important that my work contributes to making a difference in the community.

To apply, please submit a cover letter and resume to [s.landry@eccf.org](mailto:s.landry@eccf.org) by **Friday, March 5**.

## POSITION DESCRIPTION

**Title:** Gift Planning & Advisor Relations Manager

**Classification:** Full-time exempt

**Reports to:** Director of Strategic Giving & Gift Planning

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## POSITION SUMMARY

Under the direction of the Director of Strategic Giving & Gift Planning the **Gift Planning & Advisor Relations Manager** will contribute to the Foundation's asset development goals.

This position will be responsible for developing, co-leading, and executing on strategies to establish and cultivate successful relationships with potential fundholders and professional advisors that will lead to the opening of new funds, increased assets, and consistent referral sources.

The **Gift Planning & Advisor Relations Manager** is an important part of ECCF's team and whose success is essential to ECCF achieving its organizational goals.

## ESSENTIAL FUNCTIONS

### Advisor Relations

- Co-lead and execute a program to strategically identify, cultivate, and steward **deep relationships with professional advisors** as key stakeholders in the ECCF Community. The goal is to ensure that ECCF is the preferred charitable partner of Essex County professional advisors and their clients, leading to referrals of new donors interested in opening funds at ECCF.
- Co-lead, develop, and manage ECCF's **Professional Advisor Committee** with a goal to create an active group of volunteers that advises on strategy, activates its networks (of clients and other advisors), and advocates in the community in service of ECCF's goals.
- Develop and lead a communication strategy to engage, support, inspire, and educate professional advisors in Essex County. Strategy will include:
  - Developing relevant marketing materials
  - Creating and executing virtual and in-person events
  - Developing and managing relevant website content and resources
- Represent ECCF externally by creating and delivering presentations to ensure the Foundation is a known and trusted partner in philanthropy in the professional advisor community.
- Seek and advocate for opportunities to develop professional advisors as key stakeholders with a focus on cross-collaboration among ECCF's internal departments and opportunities to engage in community leadership initiatives.
- Manage and track professional advisor relationship 'moves', produce management reports, and support in the improvement and maintenance of ECCF's CRM, Salesforce.

## **Gift Planning/Fund Development**

- **Identify, engage, advise, and solicit potential fundholders** interested in utilizing a charitable fund as a vehicle to achieve their philanthropic goals. Provide interested fundholders with expertise in gift strategies and philanthropic knowledge to support their charitable giving. Meet new fund acquisition goals annually.
- Build/improve, execute, and support internal operations related to relationship development, donor management, opening and managing charitable funds, and investments.
- Improve and lead the seamless internal process of transitioning new fundholders from the 'opening a fund' process to the Donor Services team.
- Manage and track fundholder prospect pipeline, produce management reports, and support in the improvement and maintenance of ECCF's CRM, Salesforce.
- Collaborate with Donor Services colleagues to encourage growth of existing donor advised funds and maintaining primary relationship management in some instances.
- Perform other duties as assigned.

## **QUALIFICATIONS**

The following education requirements are considered essential:

- A minimum of a bachelor's degree is required with at least 4-5 years of experience in development or gift planning.
- Advanced degree and/or professional designations, such as Chartered Advisor in Philanthropy (CAP) is preferred.
- Experience utilizing Salesforce is preferred.

The following **personal characteristics and physical requirements** are considered essential:

- Must be a relationship builder, fostering positive working relationships with internal and external stakeholders while maintaining discretion, professionalism, and confidentiality.
- Operates with an entrepreneurial spirit with an interest and willingness to start where we are with a focus and ability to build towards the future.
- Demonstrates a commitment to self-driven learning and a willingness to try, learn, and iterate as a work style.
- An energetic interest for fundraising that permeates through personality, thinking, building relationships, and interacting with professional advisors and donors.
- Superior interpersonal skills with the ability to speak with diverse personalities, strong listening skills, negotiating and reasoning skills.
- Accomplished writing ability, including excellence in persuasive writing, with clear and concise use of grammar and vocabulary.
- Demonstrated ability to build relationships with volunteers and staff in a team approach that ultimately cultivates donors and leads to the accomplishment of secured gifts.

- Demonstrated use of fundraising software and “moves management” techniques that results in accurate donor records/actions AND stewardship of donors.
- Performance that achieves the high standards, integrity, and values of ECCF.
- Attendance will be required at special events during and outside of normal work week hours.
- Ability to lift objects of at least 25 pounds in weight.
- Must be able to operate and have access to a vehicle for work-related travel around the county, including travel outside of Essex County.

## **EFFECT ON END RESULT**

- The Foundation continues to grow the number of funds each year (achieving annual goals) by opening new funds (with a high-quality experience) and assisting in retaining existing funds with high donor satisfaction.
- All new funds have a strategy and have been handed off to Donor Services for the best possible transition to support the donor.
- Professional advisors see the Foundation as the best charitable giving option for their clients, viewing the Foundation with a strong sense of credibility and expertise that deliver on expectations of their clients.
- ECCF initiative campaigns are successful in acquiring the resources needed, on their determined schedule, to achieve their outcomes. A pipeline of donors is built, solicited, and stewarded as a member of the ECCF donor family.