



MAJOR AND PLANNED GIFTS OFFICER

OVERVIEW

Reporting directly to the VP of Development and Engagement, this new position will be a vital and front-facing role at the Elizabeth Dole Foundation (EDF), the nation's premier organization solely focused on supporting more than 5.5 million military and veteran caregivers and their families. EDF was founded by former U.S. Senator and Cabinet Secretary, the [Honorable Elizabeth Dole](#). Senator Dole's vision for EDF is to ensure that no military or veteran caregiver, or as we call them, our [hidden heroes](#), face their new and often difficult journey without our support.

As EDF looks forward to celebrating its 10th anniversary in 2022, we recognize the opportunity to increase our efforts to identify, engage, and solicit new major donors, in addition to renewing and increasing gifts from our current roster of donors. EDF is also interested in increasing awareness among our donors of the value and importance of planned giving. Presently, EDF is the recipient of a handful of planned gifts, without a focused effort. With this position, EDF seeks to engage donors directly and invite them to consider including EDF in their estate planning.

EDF seeks an individual with significant major gifts and planned giving experience, one with a tireless work ethic, commitment to mission, focus on excellence, creative thinking, and optimism. At present, the development team consists of a VP of Development and Engagement, a Development Manager, and Development Associate on staff. The team works with third party consultants to implement a robust and growing direct mail program.

RESPONSIBILITIES

Major Gifts

- Design, develop, and implement programs and activities to identify, cultivate, solicit, and steward donors at the major gift level (\$5,000 level and above), with a specific emphasis on growing EDF's base of donors making gifts of at least \$25,000 annually. The candidate will actively participate in the identification and qualification of new major gift and leadership gift (\$100,000+) prospects.
- Cultivate and grow a visible presence within the military and veteran caregiver community
- Regularly attend and represent EDF at major events in the military, veteran, and caregiver community and build a robust network of donors and prospects.
- Identify targets, develop, and steward relationships with EDF's dynamic donor base and other prospecting channels.
- Develop a comprehensive plan to include upgrading current donors and identifying and soliciting new donors to meet budgeted goals.



- Work strategically across EDF departments and programs to ensure donors feel connected to the organization.
- Foster opportunities for other EDF staff and leadership to connect with donors. Provide background for in-depth briefing documents in advance of such meetings. Execute events and other fundraising activities that advance EDF's relationship with donors and prospects.
- Coordinate with the Assistant to the CEO on preparation and staffing of the CEO at events and individual meetings, with a strong ability to represent EDF as needed.
- Prepare written documents in support of solicitation, cultivation, and development events, including correspondence, strategic plans, invitations, reports, and highly tailored proposals.
- Provide monthly and annual reporting related to major donor fundraising including, but not limited to, active major donor reports, prospect reports, and progress toward budgeted goals.
- Manage current donor and prospect cultivation and solicitation plans within Salesforce CRM
- Other duties as assigned.

Planned Giving

- Design, develop, and market a new Planned Giving program. Ensure that the program becomes an integrated part of the overall development effort. Work closely with the CEO and VP of Development and Engagement in the integration of an aggressive program as it relates to endowment efforts.
- Meet with planned gift prospects and their advisors, prepare financial illustrations of proposed gifts, and draft gift agreements for review by prospects and their advisors.
- Organize and conduct seminars for prospective donors, professional financial and estate planners, and other constituencies.
- Work with EDF's Marketing team to develop and produce materials to market Planned Giving program. Write articles that highlight planned gift opportunities.
- Establish procedures for tracking and qualifying prospects and for recording and reporting gifts. Refer all gifts requiring approval to the appropriate areas for acceptance.
- Other duties as assigned.

QUALIFICATIONS

Bachelor's degree and five or more years of fundraising experience - specifically focused on major gifts and planned giving



KNOWLEDGE, SKILLS, AND ABILITIES

Ability to work a flexible schedule including some evenings and weekends. This position is based in Washington, DC with opportunities for remote work. Extensive travel across the U.S. is expected to manage portfolio and meet with donors. Knowledge of Salesforce, Microsoft 365, and SharePoint a plus. Excellent personal and written communication. Excellent organizational skills and ability to manage multiple tasks.

The Elizabeth Dole Foundation is an equal opportunity employer. The Elizabeth Dole Foundation does not discriminate based on race, ethnicity, religion, sex, color, national origin, age, sexual orientation, gender identity or expression, mental or physical disability, genetic information, veteran status, caregiver status, or on any other basis prohibited by applicable law.

To Apply

Candidates interested in applying should send their resume, a cover letter (REQUIRED) including details of salary expectations, in PDF format to:

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