



Planned Giving Officer

Location: New York, NY

We believe in a world in which every human life is valued, and health and human dignity are shared by all.

We believe that access to quality healthcare is a basic human right. For more than 100 years, we have worked with global partners to deliver locally sustainable, quality healthcare solutions to women, children and their communities. We're ready to make it 100 more.

We believe change starts with her.

We work tirelessly for women's and children's health because they are disproportionately affected by illness and poverty. We know that healthy, educated, and empowered women are better able to raise healthy, educated, and confident children, and that communities depend on their livelihoods. We're making an impact – [learn more](#).

We believe in people.

We strive to live out our core values of **collaboration**, **love**, **excellence** and **respect** every day. We provide our employees with a competitive salary and a meaningful benefits package, with opportunities to learn and grow. We especially encourage all persons of diverse backgrounds to apply. *Read more from our President & CEO below.*

Overview

Reporting to the Vice President, Partnerships and working together with the department team, the Planned Giving Officer is responsible for managing cultivation, solicitation, acknowledgement, recognition, donor research, and stewardship for a portfolio of current and prospective planned gift donors. This effort includes all activities that relate to the retention and growth; and tracking of planned giving donor portfolio for CMMB. The Planned Giving Officer collaborates with the Partnership team and other fundraising colleagues and will be an integral figure in the development of a robust planned giving program.

The Planned Gift Officer has a comprehensive knowledge of the technical aspects of planned giving and the related tax regulations related to gift plans. Experienced in raising major gifts through bequests, charitable gift annuities, charitable remainder trusts and other complex gift arrangements, the Planned Giving Officer works with donors and their financial and legal advisors to secure both outright and planned gifts in conjunction with donors' needs and CMMB's priorities.

Responsibilities

- Develop strategies for identifying, cultivating, soliciting, and stewarding donors for annual support, special funds, the gala and other fundraising events, and incorporating planned gift initiatives.
- Support the Vice President, Partnerships for meetings and interactions with planned gift donors and prospects.
- Develop a multi-year strategic plan to increase revenue through marketing of bequests to CMMB donors. Collaborate with Partnerships team to integrate planned giving options messaging into marketing strategies and where best fit in direct mail pieces.
- Create and design individualized solicitation strategies and identify gift opportunities that match donors' interests, including planned giving vehicles.
- Ensure all donors are tracked accurately and acknowledged appropriately. Provide support in gift entry, donor record updates, and generating donor acknowledgments as required. Assure accurate, comprehensive data capture, reporting, and analysis for all major and planned giving efforts against key performance indicators.



- Independently manage planned giving inquiries, including phone line, email, website, and email marketing software and database; answer basic questions from donors about how to include the CMMB in their estate plans.
- Work with the Senior Director, Partnerships in contacting and stewarding planned giving prospects; build own portfolio of planned giving donors for stewardship. Develop naming opportunities and prepare proposals by targeting donors based on potential for giving.
- Create charitable gift annuity proposals and draft gift illustration contracts in PG Calc.
- Tracks realized planned gifts from estates, retirement vehicles, and other sources through probate until gifts are received in database. Conduct initial review of completed documents to ensure that they comply with the CMMB's standards, IRS guidelines, and in CMMB's best interests.
- Supervise vendor selection, management and coordination of logistics for Planned Giving and Charitable Giving Annuities (CGA) mailings, and other communications, such as both print and digital (Annual Report, Quarterly Report, etc.) from the department, either in-house or with mail house printers.
- Oversee gift administration for Major Donors, Corporations, Foundations, and Organization, including Individual Retirement Accounts (IRAs), Donor Advised Fund and Stock gifts.
- Conduct, collate and archive all donor and prospective donor research. Use donor database to keep records up-to-date and track progress and action status.
- Keep current with and knowledgeable of new trends in planned giving; be aware of new or pending tax legislation.
- Cultivate relationships with attorneys, trust officers, accountants, financial planners and other estate planning professionals. Exchange up to date information on current best practices.
- Create reports for planned giving and fundraising, including: monthly list of new members, monthly contact reports, mailing and email statistics, and develop special analytical reporting for donors, giving, campaign, financial, or other trend reports.
- Manage planning special events involving donors, including invitations, follow-up, event coordination, and onsite logistics. Assist in the execution of fundraising strategies for annual Gala and co-manage volunteers and event consultant.
- Manage the Department's annual budget and tracking maintenance.
- Development Standard Operating Procedures for designated systems or databases.
- Oversee all required State filings for the Planned Gift and CGA program, and Independent Audit. Ensure that all planned giving activities comply with local, state, and federal regulations and laws governing non-profit business operations.
- Serve as a CMMB ambassador at fundraising events and travel to charity fairs, as needed.
- Collaborate with department colleagues on cross-cutting activities and projects. Contribute to a strong culture of philanthropic values and donor-centric service; and oversee/manage special projects as assigned.
- Provide operational support to the department.
- Other relevant responsibilities as assigned by manager.

Qualifications and Requirements

- Bachelor's degree in Business, Nonprofit Management, Public Relations or related fields required. Legal experience is a plus.
- A minimum of 7 years professional, well rounded experience required in the area of planned giving, donor stewardship preferably in a nonprofit setting.
- Proficient in researching the giving potential of individuals and family foundations to secure major and planned gifts.
- Extensive knowledge of planned gift vehicles, including annuities, trusts and bequests; as well as knowledge in handling various gift vehicles, including checks, restricted awards, trusts, estates, and annuities.



- Advanced proficiency working with database programs and online research tools, such as Blackbaud's Raiser's Edge, RENXT, Luminate and managing information systems with a multi-user environment is required.
- Experience working with PG Calc,.
- Demonstrable knowledge of fundraising analytics, metrics, and reporting methodologies is a must, as are a high level of discretion and an ethical approach to fundraising. Collaborative team player who excels in a highly dynamic environment and has the ability to work cross functionally,
- Excellent communication and interpersonal skills, including ability to build and maintain positive working relationships with team members, internal customers, high-level staff and external vendors.
- Excellent organizational skills, impeccable attention to detail, and the ability to prioritize multiple responsibilities and meet deadlines.
- Experience managing gala and other fundraising events; and converting event donors into annual donors.
- Personal commitment to CMMB's mission and goals; knowledge of international affairs and global public health a plus.
- Comfortable working for a faith-based organization.

How to apply

Visit our [careers page](#) for more information, and [click here to apply](#).

A message from Bruce Wilkinson, President and CEO of CMMB – Healthier Lives Worldwide

As president of CMMB, I would like to thank you for your interest in joining with us on our journey to bring healthier lives to women, children and their families worldwide. CMMB has embarked on our second century of service to the most marginalized. Our vision of a world in which every human life is valued, and health and human dignity are shared by all is at the core of who we are. We are always looking to join hands with experienced professionals who want to add their energy to our work and are so pleased you are considering CMMB as your potential employer.

This position is critical to our mission and vision. I welcome your interest in joining our diverse, talented, professional and motivated team.

Cheers,
Bruce