



Planned Giving Officer

Location: Hybrid - 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 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 believe in people.

We strive to live out our core values of **collaboration**, **love**, **excellence**, **accountability**, and **respect** every day. We provide our employees with a competitive salary and benefits package, with meaningful work and opportunities to learn and grow. *We especially encourage all people of diverse backgrounds to apply.*

Overview

The Planned Giving Officer is responsible for managing cultivation, solicitation, acknowledgment, and stewardship for a portfolio of current and prospective planned gift donors. This effort includes all activities related to retention and growth and tracking CMMB's planned giving donor portfolio. The Planned Giving Officer collaborates with the Development team and other colleagues and is an integral figure in the development of a robust Planned Giving program.

The Planned Giving Officer has a comprehensive knowledge of the technical aspects of planned giving vehicles and the related tax regulations pertaining 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

- Proactively and strategically manages a portfolio of planned giving donors and prospective donors.
- Qualifies, cultivates, solicits and stewards planned gifts through personalized contact through phone calls, in-person and on-line meetings, and written correspondence.
- Support senior management with securing meetings and interactions with planned gift donors and prospects.
- Develop and implement a multi-year marketing plan to generate leads and increase planned gift revenue in collaboration with the Communications and Direct Marketing teams.
- Create and design individualized solicitation strategies and identify gift opportunities that match donors' interests, including planned giving vehicles.
- Ensure all donor interactions are tracked accurately in the Raiser's Edge database. Provide support in gift entry, donor record updates, and donor acknowledgment. Assure accurate, comprehensive data capture, reporting, and analysis for all planned giving efforts against key performance indicators.



- Using assigned planned giving software, prepare gift illustrations and proposals for charitable gift annuities and other planned giving opportunities, and prepare written materials such as visit strategies/briefings, correspondence, solicitation/proposal, and pledge documents.
- Manage the bequest administration process as needed, including reviewing and processing gifts under wills, trusts, and other deferred giving arrangements, and communicating with estate/trust representatives, attorneys, and financial institutions.
- Manage and maintain an ongoing dialog with CMMB's key Planned Giving vendors including FreeWill, PG Calc, Crescendo, and StateStreet Bank.
- Keep current with and knowledgeable of new trends in planned giving; be aware of new or pending tax legislation.
- Create reports for planned giving and fundraising, including monthly lists of new members, monthly contact reports, mailing and email statistics, and develop special analytical reporting for donors, giving, campaign, financial, or other trend reports.
- Develop and manage the department's annual Planned Giving budget and quarterly reporting.
- Development of Standard Operating Procedures for designated systems or databases.
- Oversee all required State filings and registrations 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.
- 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.

Qualifications and Requirements

- Bachelor's degree in business, Nonprofit Management, Public Relations, or related fields required. Legal experience is a plus.
- 3-5 years minimum required experience in donor-facing fundraising or client-facing sales. Planned giving, annual campaign, or major gifts background preferred Knowledge of planned gift vehicles, including annuities, trusts, and bequests.
- Advanced proficiency in working with database programs and online research tools, such as Blackbaud's Raiser's Edge'RENXT, and Luminate, and managing information systems with a multi-user environment is required.
- Experience with software such as Crescendo or PG Calc is preferred.
- Excellent communication and interpersonal skills, including building and maintaining 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.
- Personal commitment to CMMB's mission and values.
- Comfortable working for a faith-based organization.
- 1-2 days per week in CMMB's New York City office required.



Behavioral Competencies

Demonstrate CMMB's core values in action:

Collaboration: To work in partnership for locally sustainable solutions, Love: To embrace and be compassionate towards all people, Excellence: To deliver sustainable, quality, and impactful results, Accountability: To hold ourselves and each other to high ethical standards and practices, that maintains the good name of CMMB around the world. Respect: Always act with integrity and value and honor the dignity of all.

CMMB is committed to fair and equitable compensation practices

The starting pay range for this role for candidates in New York is \$90,000. Actual compensation packages are based on several factors that are unique to each candidate, including but not limited to skill set, depth of experience, certifications, and specific work location. This range may be different in other locations.

EEO Statement

At CMMB, we embrace diversity and demonstrate compassion towards all people—it is one of our core values. We are committed to building a team that represents a variety of backgrounds, perspectives, and skills. CMMB is proud to be an equal opportunity employer and complies with all applicable federal, state, and local fair employment practices laws. CMMB strictly prohibits and does not tolerate discrimination against employees, applicants, or any other covered persons because of race, creed or religion, color, national origin, disability, predisposing genetic characteristics, marital status, sex, gender, gender identity, gender expression, pregnancy, age, sexual orientation, military or veteran status, citizenship, status as a victim of domestic violence, or any other protected classification under applicable federal, state, or local laws. This statement applies to all terms and conditions of employment. CMMB is committed to fostering an inclusive and accessible experience for all job seekers-- If reasonable accommodation is needed, you may contact us at humanresources@cmmb.org.

How to apply

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