



## Director Planned Giving – Santa Rosa, CA

### To Apply:

<https://www.paycomonline.net/v4/ats/web.php/jobs/ViewJobDetails?job=102023&clientkey=22FF4513AB37701A06793968F9AAE100>

### Why Join our Team?

As a Canine Companions employee, you'll enjoy knowing that every day you make a difference in the lives of people with disabilities. You'll give independence and give a dog a job!

Canine Companions dedication to our mission is only equaled to our dedication to our employees.

### FULL-TIME BENEFITS:

- Comprehensive benefit program including employer-paid medical, dental and vision for staff
- 14 paid holidays, including an Inclusion Holiday
- 17 paid days off (Paid time off, PTO), including additional hours to serve your community
- Employer matched 403(b) retirement plan
- Employee Assistance Program/Wellness Programs
- Diversity, Equity and Inclusion Committee dedicated to ongoing efforts to foster a diverse and inclusive workplace by setting actionable goals and evaluating progress

*“At Canine Companions, not only do you know you’re helping people live more independent lives, but you get to meet our clients and hear about the ways their dogs have enhanced their lives – it’s truly an amazing place to work.”*

*PR and Marketing Coordinator*

## About the Position

This position serves as part of the national philanthropy team and is responsible for designing and implementing strategies to secure planned gifts, including cultivation, solicitation, and stewardship of individual

donors, developing and implementing marketing strategies for growth, and partnering with regions for facilitating planned gifts. Bequest administration is a key responsibility of the position and provides hands-on administration of estate bequests including the receipt, documentation and all follow-up and correspondence required.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned as needed:

- Strategize and implement plans to gain, secure and cultivate gift donors, identifying opportunities for both current and deferred gifts.
- Identify, contact and engage planned giving prospects.
- Engage in strategic direct donor contact to support, encourage and improve donor understanding of the organization mission, needs and accomplishments as well as to encourage and improve planned giving contributions and support.
- Oversee development of planned giving information and materials for distribution to public, present gifting information and options to public, potential donors, Canine Companion volunteers and staff.
- Oversee the Heritage Society to steward members and promote additional planned giving options and maintain current members.
- Coordinate regional and national receptions for Heritage Society members, major donors and volunteers.
- Compose and publish newsletters for Heritage Society members.
- Conducts preliminary review and analysis of incoming wills, trust documents, accountings and financial statements for legal compliance.
- Monitors progress of estate administration and provides status updates and reports.
- Manages the Charitable Gift Annuity activities including analyzing and ensuring compliance with filing requirements of individual states.
- Acknowledge planned gifts in a timely fashion in accordance with professional practices and regulations.
- Acknowledge bequest distributions in a timely manner in accordance with best practices and government regulations.
- Develop opportunities for other special gifts, including gifts of stock, real estate property, gift annuities and other assets.
- Develop professional relationships with resources and consultants on a pro bono or paid basis to assist in the implementation of major and/or planned gifts, to educate donors in such gift opportunities and to ensure compliance with laws and regulations governing such gifts.
- Advise Vice President Philanthropy, CEO, and CFO on planned giving opportunities, key strategies, direction and methods.
- Advise regional staff on current and deferred gift opportunities.
- Work closely with CFO and Controller on income recognition, CRT, PIF and CGA administration.
- Prepare planned giving reports; present updates to management and National Board

- Be accountable not only for direct responsibilities outlined in this job description but also to serve fellow staff and other constituents with whom position interacts. Ensure actions and communications follow core values.

**MUST HAVES:**

- Able to work independently and collaboratively with philanthropy peers.
- High-level of organization and follow up skills; maintaining a high volume of trust and will paperwork and updating donor records in Salesforce.
- In depth knowledge of planned giving and its complexities; estate planning, tax laws, wills, trusts, etc.
- Knowledge and understanding of Moves Management.
- Knowledge of state specific charitable gift annuity regulations.
- High-level oral, verbal and written communication skills required, including public contacts.
- Able to self-manage, prioritize tasks, and meet goals. Problem solving and attention to detail.
- Able to maintain confidential information.

**NICE TO HAVES:**

- Minimum of five years Planned Giving experience; experience working closely with Finance and Marketing.
- Degree in non-profit management; or five years related experience and/or training; or equivalent combination of education and experience.

**SCHEDULE:** Full Time

**PAY:** \$95,000 – \$105,000 per year

We recognize that people come with a wealth of experience and talent beyond just the technical requirements of a job. If your experience is close to what you see listed here, please still consider applying. Diversity of experience and skills combined with passion is a key to innovation and excellence. Therefore, we encourage people from all backgrounds to apply to our positions. Please let us know if you require accommodations during the interview process.

The base salary range below represents the low and high of the Indeed salary range for this position. Actual salaries will vary and may be above or below the range based on various factors including but not limited to location, experience, and performance. The range listed is just one component of total compensation package for employees.

Pursuant to local Fair Chance Ordinances, we will consider for employment qualified applicants with arrest and conviction records.