

# Planned Giving Officer

## West Coast



## Environmental Defense Fund



Over 50 years ago, eight scientists and a lawyer met to sign papers establishing a new kind of environmental group. Some were ornithologists, with strong evidence that the pesticide DDT was causing the eggshells of ospreys to crack. Their novel idea was to go to court to save America's birds of prey, but they succeeded beyond their wildest dreams, birthing the Environmental Defense Fund in 1967. EDF is an environmental advocacy group that advocates on the issues of global warming, ecosystems restoration, oceans, and human health, and uses science, economics and law to find environmental solutions that work.

**EDF's People:** EDF is one of the world's largest environmental organizations, with more than two million members and a staff of 700 scientists, economists, policy experts, and other professionals around the world.

**EDF's Values:** EDF believes prosperity and environmental stewardship must go hand in hand. The organization is full of optimists with smart ideas making a huge difference. EDF has built strong partnerships across interests to ensure lasting success.

**EDF's Focus:** EDF addresses today's most urgent environmental challenges. Working in partnership with others, it focuses on where it's best positioned to help, based on its strengths.

## Finding The Ways That Work

The Environmental Defense Fund supports animal-friendly environments to boost the global food supply for the world's growing population. Huge strides in agriculture have been made by making changes to sustainable environments and fisheries to achieve the goal of feeding 9.7 billion people by 2050.

The organization uses its scientific expertise to expose critical flaws in America's chemical policy. Toxic chemicals are in everyday household products, food, and water: EDF works to protect health by reducing exposure to substances that may be harmful to humans, animals, and the land.



# Forging The Way Forward

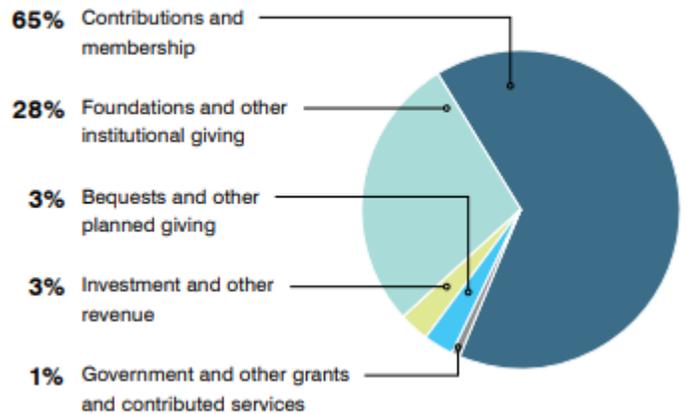


The Environmental Defense Fund leads in gaining results that create a healthier environmental space. The staff is devoted to tracking, reviewing, conducting and applying cutting-edge research and regularly collaborates with the best scientific minds from other leading institutions. The organization focuses on economics, to make it profitable to protect nature. For decades, EDF built environmental coalitions with fishermen, ranchers, corporate leaders, and other unlikely allies to team up on projects. Whenever presented with a new environmental challenge, EDF's partnerships help create environmental solutions that make a lasting difference in the world.

## The Development Program

The development staff at EDF is working to expand the planned giving program. With over 2 million members, EDF is able to provide resources to support efforts to eradicate environmental challenges. EDF has a large network on the West Coast and would like to cultivate those members for bequests and planned gifts. The Planned Giving Officer will join a robust development program to expand support in planned giving to meet the goals of the 2025 strategic plan. The current development program at EDF is mainly supported by contribution and membership, who make up 65% of the revenue. The expansion of the planned giving program will help the organization stabilize the global climate, build defenses against extreme weather, ensure food security and abundant oceans, and reduce exposure to air pollution and toxic chemicals.

### SOURCES OF SUPPORT AND REVENUE



# The Opportunity

The Planned Giving Officer will lead and coordinate planned giving on the West Coast. The Officer will cultivate, solicit, and steward a portfolio of current and prospective legacy donors in California; close bequests, charitable gift annuities, and other planned gifts through personalized correspondence, telephone calls and face to face visits. Reporting to the Director of Planned Giving the Planned Giving Officer will work in collaboration with the full planned giving team.

## Donor Outreach and Stewardship

- ❖ Pursue and maintain strong and lasting relationships with current and prospective Planned Giving donors through regular communication via mail, telephone, email, and occasional personal visits.
- ❖ Analyze prospects' potential for planned gifts and develop tailored proposals designed to maximize donor engagement and support at all levels.
- ❖ Create compelling request letters, donor proposals, and other correspondence.
- ❖ In conjunction with the Director of Planned Giving, track and coordinate moves management for current and prospective planned giving donors.

- ❖ Work closely with donors and their professional advisors to structure planned gifts appropriately.
- ❖ Prepare timely and complete gift proposals and illustrations, transfer documents, bequest language, and other agreements to secure planned gifts.

## Department Coordination

- ❖ Develop and maintain strong collaborative working relationships within the Development department and with all levels of EDF staff.
- ❖ Work with the membership and the major and planned giving team to maximize lead generation and cultivation activities.
- ❖ Coordinate with the major and planned giving team on donor stewardship and recognition efforts to develop and execute a range of cultivation and stewardship activities, including donor and estate outreach, stewardship and recognition programs, and special events.



# The Candidate

The ideal candidate will be a planned giving expert who is comfortable working at a fast pace, both in planning the strategic expansion of a fundraising program and in executing the plan through frequent visits to prospects and donors across the state of California. The Officer will be an experienced development professional with the skills and drive to implement all aspects of a comprehensive planned giving program. At the same time, the candidate will be able to provide partnership and support to the team of Planned Giving Officers.

## Background

- ❖ At least five years of experience as a gift or estate planning professional, including outright gifts and revocable and irrevocable deferred giving vehicles; non-profit experience is strongly preferred.
- ❖ Bachelor's degree is required.

## Skills and Accomplishments

- ❖ Demonstrated knowledge of planned giving vehicles and basic estate and financial planning, including the tax implications of charitable giving; ability to apply this knowledge to address individual donor needs and goals.
- ❖ Exceptional planning, organization, time management, analytical, and multi-tasking skills.

- ❖ Ability to interact professionally and effectively with a diverse range of stakeholders, including donors, corporate and individual fiduciaries, attorneys, accountants, financial custodians, surviving family members, and key internal partners within EDF.
- ❖ Capacity to work easily and effectively with a wide range of people; adept at building relationships.
- ❖ Comfortable working in a fast-paced, flexible, collegial, goal-oriented and entrepreneurial environment.
- ❖ Highest level of personal and professional integrity and quality standards.
- ❖ Proficiency in Word, Excel, PowerPoint, PGCalc, and donor tracking software (preferably Sales Force).
- ❖ Excellent writing, communication, and presentation skills.
- ❖ Commitment to the mission of the Environmental Defense Fund.
- ❖ Ability to travel as needed.





Questions, résumés, and CVs should be sent  
to [search@driconsulting.com](mailto:search@driconsulting.com)

All first round interviews for this position will take place at Development Resources, *inc.* at 1820 N. Fort Myer Drive, Suite 702, Arlington, VA 22209, (703) 294-6684, or via telephone/video conference.

DRi is an executive search and development consulting firm that recruits senior leaders and works with them to build talented teams, create bold strategic plans, and design powerful fundraising programs.

The Environmental Defense Fund is an Equal Opportunity Employer and is seeking a diverse slate of candidates for formal consideration.



Search conducted by [Development Resources, inc.](http://www.driconsulting.com) [www.driconsulting.com](http://www.driconsulting.com)