



Position Title: Gift Planning Officer

FLSA Status: Exempt

Department: Development

Date Completed: 04/01/2025

Position Summary:

The goal of YCCF's Development Department is to become the undisputed first choice for endowed charitable giving in York County. The Gift Planning Officer is responsible for generating and cultivating donor relationships so that YCCF meets its development goals. Often the first point of contact for potential donors, the Gift Planning Officer must have outstanding customer service skills, a thorough understanding of all giving options and be strategic and deliberate in completing the cultivation process.

The Gift Planning Officer manages a portfolio of current fundholders, legacy members and prospective donors. The Gift Planning Officer is engaged in all stages of fund creation and planned giving process to ensure donor satisfaction. As an integral member of the Development Department, the Gift Planning Officer collaborates with the team to develop and enhance strategies, communications and processes, and database functionality to raise the visibility of YCCF in the community and respond to stakeholder needs efficiently and effectively. This includes developing and publishing accurate dashboards and reports to inform decision-making, integration of processes to ensure efficient and effective service to current and potential donors, and process alignment to other functional areas within the organization to ensure operational efficiency.

Essential Responsibilities and Duties:

1. Demonstrated commitment to organizational Core Values including courage, diversity, equity and inclusion, strategic, collaborative approaches, integrity, and innovation. See Appendix A for more details.
2. Commitment to standard office schedule with added participation in Community Foundation events on occasional evenings or early mornings
3. Demonstrated capacity to collaborate with diverse stakeholders.
4. Ability to maintain confidentiality of information and other related matters.
5. Develop and implement cultivation strategies with a portfolio of existing fundholders, prospective fundholders and legacy members to ensure they remain engaged and interested in expanding their partnership with YCCF.
6. Collaborate with various YCCF departments to ensure that donor stories are accurately portrayed, and their intentions are carefully stewarded.
7. Assist with outreach and promotional activities to the professional legal, tax and financial planning advisor community including making public presentations.

8. Assist in the transition of bequests and estates to YCCF.
9. Develop donor prospect research for the Vice President and President.
10. Maintain accurate and current records of interactions with all stakeholders via database.
11. Maintain database systems and processes to ensure integrity, security, and performance. Make recommendations, design, implement, and optimize database updates, while also troubleshooting and resolving technical issues as appropriate for the functional area.
12. Assist with the training of other staff on database maintenance and improvements as necessary.
13. Assist in the development of analytic reports of trends and results to inform strategies and report to YCCF Board of Directors and committees.
14. Serve as back-up to the Vice President and President with all donors and prospective donors when necessary. Assist in the evaluation of YCCF's Gift Acceptance Policy to balance organization's growth and donor needs.
15. Maintain a solid understanding of YCCF's investment approach.
16. Help translate investment strategies and returns to donors.
17. Other duties or projects as assigned.

Organizational Responsibilities and Duties:

1. Be actively engaged in the community.
2. Represent the organization externally, as necessary.
3. Where possible, identify community issues and philanthropic trends that impact YCCF's mission.
4. Identify and assist in building relationships and opportunities with organizations that can advance the Foundation's priorities.
5. Participate, as appropriate, in industry associations to stay current on best practices and help promote legacy giving in York County
6. Maintain consistent communication with YCCF's grantmaking department to ensure donor's intentions are sustained and to collect grantee stories to share with donors.
7. At times, assist in the resolution of grant distribution challenges to ensure timely and accurate processing of grants from fund(s).
8. Assist in the development of department and organizational plans and strategies.
9. Collaborate with team members throughout the organization to streamline processes and maximize services for donors.
10. Incorporate organization's values into all interactions with colleagues.
11. Maintain an attitude of continuous improvement to identify and implement ideas for organizational improvement.

Qualifications and skills:

1. Bachelor's degree in related field.
2. Working knowledge of Microsoft Office products including Word, PowerPoint, Excel
3. Must be an effective communicator, both orally and written.
4. Four years of experience in fundraising, asset development or a client-centered field.
5. A commitment to excellent customer service and demonstrated capacity to work with diverse stakeholders.
6. Enthusiasm for engaging donors in becoming more connected to the community through their philanthropy and through the community foundation endowment model.
7. Exemplary ability to work collaboratively and to maintain positive relationships with the team.
8. Ability to maintain a flexible office schedule to accommodate donor availability and YCCF presence in the community with required participation in Community Foundation events on occasional evenings or early mornings.

Physical Requirements:

1. Ability to work under stress and work additional hours to meet reporting deadlines.
2. Required to sit for extended periods of time.
3. Required to sit, stand, walk; occasionally required to stoop, kneel, crouch.
4. Ability to ascend and descend stairs.
5. Required to reach with hands and arms and push items overhead.
6. Occasional lifting of up to 25 lbs.
7. Required to talk, hear and see. Vision requirements for this position include close vision, distance vision, peripheral vision, depth perception, ability to adjust focus, and ability to differentiate between colors.
8. Dexterity is mandatory as this job requires frequent use of hands and fingers, including keystrokes on computer keyboard and calculator.
9. Ability to travel to and from facilities, community organizations, and/or donor locations as necessary.

Work Environment:

1. The position primarily works in an office environment, seated at a desk for extended periods of time.
2. Frequent and ongoing interaction with employees.
3. The noise level in the work environment is usually moderate.