

## Position Announcement

### Director of Gift Planning

Orange County Community Foundation  
Newport Beach, California

**Reports To** Vice President, Philanthropic Planning & External Relations

**Organization Profile** The mission of the Orange County Community Foundation (OCCF) is quite direct and simple: *To Inspire a passion for life long philanthropy, Faithfully steward the intentions of our donors and Catalyze sustainable community impact.*

OCCF is located in Newport Beach, one of many interesting cities within Orange County. This county has a very large population base of over 3.4 million people having broad diversity and a seismic list of businesses, educational institutions, health care facilities, tourist attractions, parks and seacoast attractions.

The Orange County Community Foundation works with generous individuals, families and businesses to improve life for the people who call Orange County home.



The Orange County Community Foundation is working to change their community—to make it more vibrant, healthier and stronger for all of its residents. They believe in people helping one another and in providing opportunities that have real impact.

Since their founding in 1989, the Orange County Community Foundation has granted more than \$480 million to meet the needs of people in Orange County, the nation, and around the world. In just the past decade, the Foundation has granted \$190 million to deserving local nonprofits and students seeking to further their education. They could not do it without their donors, who have seen a need and turned it into an opportunity.



OCCF has experienced dramatic growth with the leadership of Shelley Hoss, President, which has placed them as a stand-out among more than 780 community foundations across the nation. OCCF is currently the

**Shelley Hoss** 8th most active grant-maker among its colleagues, and in the top 10% in total assets.

## Position Summary

The Orange County Community Foundation is seeking a Director of Gift Planning. This newly created role offers the opportunity to make a direct impact on an organization that partners with generous individuals, families, foundations, and businesses to fulfill their philanthropic and financial objectives while supporting the causes they care about most.

Working directly with the Vice President, Philanthropic Planning and External Relations, this position is responsible for developing and executing strategies to cultivate donors and build strong relationships with professional financial advisers and their clients.



**Mary Jacobson**

The ideal candidate is a skilled relationship builder and collaborator, experienced in securing gifts of cash and appreciated stock as well as complex assets including real estate, full or partial interest in privately held companies ("S" or "C" corps), and who is capable of building an effective *OCCF Professional Advisor Network*.

This position requires many skills and the ability to function in a variety of roles including that of charitable fund expert, administrator, facilitator, storyteller and advocate. The ideal candidate will be passionate about making the community a better place and would excel by joining a development team that works collectively to reach this reality.

## Specific Responsibilities

- Partner with the OCCF team to create and execute a strategy for establishing and stewarding current donors and cultivating prospects for current and deferred gifts.
- Maintain professional contact with professional advisors (CPAs, estate planners, trust and estate attorneys).

- Serve as the key contact for establishing new Donor Advised Funds and with current donor advisors seeking to grow their fund.
- Serve as an institutional resource for complex charitable planning options, both in the areas of planned gifts and current gifts.
- Manage a donor portfolio, comprised of a range of donor advised funds, bequests, charitable gift annuities and other planned giving vehicles.
- Consult, as needed, with outside counsel and related contracted service administrators.
- Assist in complicated gift transactions, including gifts of real estate, life insurance and private stock transfers.
- Attend and participate in industry conferences, events and local professional networks to establish significant visibility for OCCF. Present at conferences and workshop as appropriate.
- Plan and implement opportunities to engage the professional advisor community to build awareness of charitable planning options available at OCCF that can support their client's philanthropic goals.
- Assist in the development of outreach programs to build awareness of legacy giving to current donors and professional advisors.
- Work with the Vice President and other senior staff to identify and evaluate current and potential planned giving and charitable planning opportunities for individuals and nonprofits.

## Qualifications

Qualities and experiences that ideal candidates should display include:

- Master's or other advanced degree, preferably in legal, business or tax focused program. Bachelor's degree will be considered if accompanied by other specific work experience in nonprofit planned giving or estate or tax planning with a legal, tax or financial institution.
- Five or more year's of demonstrated experience in fundraising for community-based organizations and/or foundations or equivalent relevant experience within a legal or financial firm.
- Understanding of complex charitable giving vehicles, such as charitable remainder trusts, charitable LLCs and charitable gift annuities.

- A track record of engaging professional advisors on an individual and group level.
- Comfortable speaking to groups of allied professionals in regard to the ways that philanthropy can strengthen relationships with their clients.
- Ability to work independently and make both strategic and tactical decisions.
- Demonstrated success in acquiring, developing and retaining donor or client relationships resulting in significant support for an organization.
- Expertise in complex and large gift transactions such as planned gifts, gifts of complex or illiquid assets and real property preferred.
- Solid knowledge of tax matters and other legal requirements related to fundraising.
- Exceptional verbal and written communication skills.
- Excellent people and project management skills, with ability to work with diverse groups and on multiple projects simultaneously.
- Proficiency using specific planned giving computer programs (*Crescendo* or *PG Calc*).

**Preferred**

Preference will be given to candidates that also display one or more of the following:

- Advanced academic degree in law or finance.
- Experience with *Raiser's Edge*.
- Familiarity with basic real estate management and law.

**Memorandum**

The salary and benefits are competitive and commensurate with experience, qualifications, and verifiable salary history. Paschal • Murray supports the commitment of our client in encouraging applicants from diverse backgrounds and cultures. As a condition of employment, our client reserves the right to conduct background verification including academic, work, driving, credit, and criminal histories.

This position will require occasional work during evening and weekends. It is expected that the hired candidate will have the ability to obtain a California driver's license and have, maintain suitable automobile transportation.

The Orange County Community Foundation is an equal opportunity employer. They consider applicants for all positions without regard to race, color, religion, sex, age, national origin, ancestry, disability, political affiliation, marital status, sexual orientation or any other legally protected status.

This position announcement is not intended to be an exhaustive list of all responsibilities and requirements. It is presented as a fair reflection of the principal job elements.

---

Nominations and applications are welcome. Please send résumé and letter of application as separate documents attached to an e-mail message to:

**Colette M. Murray, Search Consultant  
Paschal•Murray  
Executive Search  
San Diego • Wilmington**

**colette@paschalmurray.com  
Voice: (760) 863-4512  
www.paschalmurray.com**