



## Director, Gift Planning

Appalachian Mountain Club

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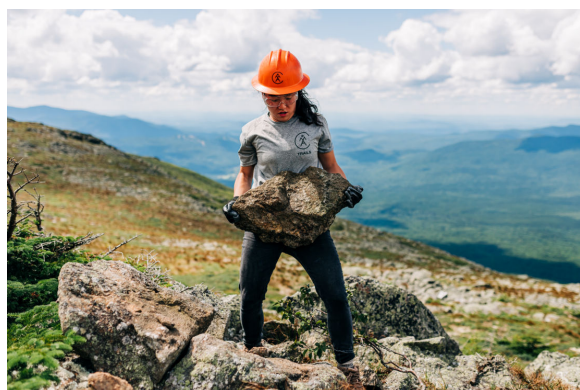
BOSTON | NEW YORK

***The Appalachian Mountain Club seeks a collaborative new Director, Gift Planning to lead its strategic planned giving program as the organization embarks on its largest comprehensive campaign in its 150-year history***

## **About Appalachian Mountain Club**

Founded in 1876, the Appalachian Mountain Club (AMC) is the oldest conservation and recreation organization in the United States. AMC's mission is simple yet powerful: foster the protection, enjoyment, and understanding of the outdoors.

Supported by over 90,000 members and with 11 chapters from Virginia to Maine, AMC works to conserve the mountains, forests, waters, and trails of America's Northeast and Mid-Atlantic regions. AMC oversees and stewards well over 100,000 acres of land and 1,800 miles of trails and offers over 5,000 outdoor activities each year to help participants experience, appreciate, and learn more about the outdoors. Additionally, AMC is engaged in scientific research investigating the impacts of climate change and is committed to reducing its burden by protecting and managing land that sequesters carbon, protects biodiversity, and increases the resilience of landscapes and communities. In addition to supporting public policy to address climate change, AMC is committed to reaching "net zero" emissions as an organization by 2050.



AMC is inspired by the untold diversity of its members and friends, and aims to be an inclusive, equitable, and kind community. AMC is united in its adventures by mutual trust, collective safety, respect for the natural world, and appreciation for our time together outdoors. With a focus on protecting mountains, forests, waters, and trails throughout the Northeast and Mid-Atlantic regions, AMC envisions a world where natural resources are healthy, loved, and always protected, and where the outdoors occupies a place of central importance in every person's life.

*For more information about Appalachian Mountain Club, please visit <https://www.outdoors.org/>*

## **About the Position**

A new position, the Director, Gift Planning is responsible for overall strategic leadership and management of AMC's planned giving program. Reporting to the incoming Senior Director, Principal Gifts, this position will work closely with all frontline fundraising staff, including the Chief Development Officer (CDO) and AMC management team at a time of transformation and growth, as the organization launches its largest fundraising campaign in its 150-year history. Informed by a new strategic plan and guided by the leadership of CEO & President Nicole Zussman and a freshly invigorated senior management team, this is an exceptionally special moment to help set the future course for AMC by co-creating transformational funding opportunities in partnership with AMC's program leadership, and to collaboratively advance relationships with major and principal gift donors and prospects.

AMC anticipates that its comprehensive fundraising campaign goal will incorporate a significant planned giving goal (from gifts including realized bequest revenue, irrevocable and revocable gifts). This position will be pivotal in driving strategic initiatives to maximize planned giving efforts during this campaign. The

Director, Gift Planning is responsible for securing planned and complex gift assets and/or blended gifts (i.e., a combination of annual, outright, revocable, and irrevocable deferred gifts) with a particular focus on gifts of \$100,000 and above.

The Director, Gift Planning will collaborate with frontline funders, AMC's management team and Board members to identify and qualify prospects. This position will partner with the Development Operations team to utilize top industry tools to cultivate, solicit, administer, and steward planned gifts.

Immediate cash revenue from realized planned gifts averages \$2.7 million annually; AMC is approaching \$100 million in charitable assets under management. These revenue streams are expected to grow proportionately as AMC advances its comprehensive campaign. AMC has nearly 400 members in the Summit Trust, its legacy society, and very few of these gifts have been documented. Growing this pool of donors while simultaneously cultivating and soliciting them for current and deferred gifts is a key priority of this position.



This position aligns both staff and volunteers to advance AMC's mission and its four strategic priorities:

- Inspire joyous, meaningful outdoor experiences.
- Protect critical landscapes for the well-being of people and the outdoors.
- Cultivate and sustain a robust, diverse, and welcoming community.
- Foster equity in the outdoors.

## Key Responsibilities

### Strategic Direction

- Provide strategic program leadership and direction to AMC's planned giving program.
- Work in tandem with the Senior Director of Principal Gifts to encourage, motivate, and incentive frontline fundraisers to cultivate and secure a variety of planned or complex gifts from donors, including combinations of outright and deferred gifts.
- Actively contribute to principal and major gift-level strategy discussions. Bring forward blended gift solutions that help donors maximize giving.
- Establish budget and activity goals for planned gifts in consultation with the CDO and Senior Director, Principal Gifts, and develop both annual and multi-year strategies to reach them.
- Work with the Development Operations team, Finance department, and other colleagues to ensure proper forecasting, handling, and crediting of revenue from planned gifts.
- In cooperation with Marketing and Communications, Development Operations, Annual Giving and the frontline fundraising team, as well as third-party vendors, enhance the existing gift planning marketing program to increase awareness, education, and interest in current and deferred giving opportunities through mass gift appeal mailing, targeted prospect mailings, online appeals, and messaging to all AMC donors, prospects, and members.
- Work with Development and Marketing and Communications colleagues to identify opportunities to integrate planned gift marketing and recognition into existing appeals and stewardship efforts.

## Donor Cultivation, Solicitation, and Stewardship

- Manage a portfolio of current and prospective donors to deepen relationships and maximize lifetime giving via outright, split-interest, and gifts through wills and living trusts, retirement accounts, life insurance policies, charitable remainder trusts, and charitable gift annuities, as well as outright gifts of complex assets such as stock, mutual funds, personal property, and other non-cash assets.
- Personally solicit high-value donors and prospects for outright and deferred gifts of \$100,000 or more, including blended outright-deferred gift arrangements, and negotiating appropriate terms and arrangements.
- Ensure that the Summit Trust members are well-stewarded through a variety of approaches, including print and digital communications, personal and customized engagement, and curated activities.
- Respond to planned giving inquiries by prospective donors in a timely manner
- Identify high-level prospects for blended gift solicitation, create customized cultivation and stewardship plans based on individual donors' giving capacity, and engage donors around opportunities for new outright and deferred gifts.
- Provide guidance to frontline fundraisers on planned giving approaches and opportunities through trainings and educational sessions and integrate planned giving vehicles into fundraisers' toolboxes.
- Consult with and develop a network of legal and financial professionals and financial institutions as necessary to build knowledge of tax laws and gift planning trends and to ensure that all gifts are in line with donors' goals, AMC's mission and policies, and IRS regulations.



## Key Qualifications

- Minimum of 7 years of planned giving or major gift fundraising experience and/or experience with trusts and estates, tax accounting, financial planning or wealth management with increasing levels of responsibility.
- Demonstrated track record of planned giving solicitation experience, with fundraising success in the cultivation, solicitation, and stewardship of major (six-figure) and principal gifts (seven+ figures), and success in strategically engaging and securing gifts from previously unaffiliated constituencies.
- Strong knowledge of current and evolving trends in charitable giving, particularly in the areas of complex estate planning tools, charitable tax law, estate and probate laws and personal finance.
- Excellent interpersonal and negotiation skills.
- Superior verbal and written communication skills, including the ability to communicate complex financial and program information clearly and concisely.
- Facility with employing CRMs and reporting to inform a data-driven approach to moves management. Experience using Salesforce a plus.
- Experience working with gift planning software such as PG-Calc.
- Experience engaging groups of diverse stakeholders, from complex organizational teams to volunteers.

- Strength in developing fundraising strategies and experience working directly with the most senior levels of an organization.
- Strong willingness to collaborate in a highly team-based environment; ability to build working relationships up, down, and across a large and diffuse organization.
- A history of and commitment to diversity, inclusion, and confidentiality.
- Willingness and ability to adhere to the Association of Fundraising Professionals Code of Ethical Standards.
- Successful track record translating research and program activity into compelling philanthropic objectives.
- Knowledge and experience working on climate and conservation policy and/or environmental issues is a plus.
- The ability to travel frequently in support of AMC's philanthropic priorities (including weeknights and weekends), staffing multiday events as well as cultivation and solicitation visits with the President & CEO and CDO, Board members, and other volunteers.
- JD or Master's degree preferred although not required
- The ability to travel frequently in support of AMC's philanthropic priorities (including weeknights and weekends), staffing multi-day events as well as cultivation and solicitation visits with the President & CEO, CDO, Board members, and other volunteers. Travel may involve going to backcountry locations and staying in dormitory-style accommodation. AMC encourages candidates to have a willingness to learn how to engage in outdoor recreational activities, including skiing, snowshoeing, or hiking in difficult terrain.



***AMC welcomes all qualified candidates to apply, and they invite the full participation of all individuals currently underrepresented in the outdoor community. This includes but is not limited to, individuals from racially and/or ethnically diverse communities, individuals with disabilities, individuals from LGBTQ+ communities, and individuals who experience intersectionality with one or more of these identities.***

This is a remote position with preference for the candidate to be based in the Northeast. The salary range for this position is \$110,000 - \$150,000 and is dependent on a candidate's permanent location.

To express interest, please submit your cover letter and resume in confidence [here](#).

For more information, please visit [www.developmentguild.com](http://www.developmentguild.com).

**Jesse Bryan**

**VICE PRESIDENT, EXECUTIVE SEARCH**

Development Guild DDI

## About Development Guild DDI

*For 45 years, Development Guild DDI has consulted to leaders across the nonprofit spectrum. Based in Boston and New York, we have successfully collaborated with more than 650 clients nationwide in the sectors of health & science, education, environment, the arts, and social justice. We are experts in executive search and fundraising and are at the forefront of delivering best practice in these services.*

*With each engagement, we work in teams tailored to a client's particular needs, providing sector-specific intelligence, cross-sector insight, and hands-on functional expertise. We combine our perspective on nonprofit leadership with our knowledge and experience in both fundraising and executive search. This distinct perspective enables us to deliver the most strategic and measurable impact.*

