



Executive Search for the  
**Director of Annual and Major Gifts**  
North Carolina Bar Foundation

February 2018



## **North Carolina Bar Foundation**

Position Description: Director of Annual and Major Gifts

<https://www.ncbarfoundation.org/>

Applications will be accepted through March 5, 2018 or until position is filled.

### **Background**

Energized and refocused under a new mission statement of *"Uniting the talent and generosity of our profession to be a power of greater good for the people of North Carolina..."*, the North Carolina Bar Foundation (the Foundation) seeks to hire a Director of Annual and Major Gifts, to provide top-level leadership for its fundraising program. The Director of Annual and Major Gifts is a new position within the Foundation created as an outgrowth of an extensive needs assessment completed in fall 2017.

Established in 1960 as part of the North Carolina Bar Association (the Association), the Foundation recently underwent an intensive reorganization in concert with the Board of Directors' decision to refocus the Foundation's identity and concentrate solely on pro bono and public service programs, fundraising and grant-making with the goal to build a stronger and more meaningful culture of philanthropy among lawyers across the state. Since its founding, the Foundation has raised \$14.7 million from 5,624 donors in annual and endowed funds. The Annual Fund campaign sets and exceeds goals routinely. In 2016-17, the annual campaign raised \$213,011 in unrestricted funds from 961 donors that were used to support Foundation operating costs and five staff-administered public service and pro bono programs: 4ALL Statewide Day of Service, Lawyers for Literacy, Middle School Mock Trial, NC Free Legal Answers and NC LEAP. Funds from the annual campaign have frequently been combined with endowment grants to create greater impact in each program area. Created in 1987, the Foundation's \$12 million endowment has made 729 grants exceeding \$5.7 million to programs and projects and has grown to be one of the largest bar endowments in the country.

The 32-member Board of Governors of the Association also serves as the Board of Directors of the Foundation. The Executive Director leads both organizations while the Senior Director of the Foundation directs the Foundation and currently supervises seven full- and part-time staff. The work of the Association and Foundation is informed by the "Vision 2020" strategic plan.

### **Position Highlights**

The Foundation's first Director of Annual and Major Gifts will be a skilled and innovative fundraising professional, team player and strategist, experienced in implementing best practices for raising major and Annual Fund gifts and who is excited by the opportunity to inspire a new culture of philanthropy among the Association members. The Director of Annual and Major Gifts will work in collaboration with the Development Department team, and will report to the Senior Director.

The primary responsibilities of the Director of Annual and Major Gifts will be to reimagine an Annual Fund and major gifts effort that is smart, assertive and stimulates a vibrant donor pipeline improving the Foundation's ability to move donors to greater levels of giving, including larger gifts to establish Justice and Liberty Funds, which honor esteemed members of the legal community. The Executive Director, Senior Director, and the major gift officers will all carry major gift portfolios.

Significant untapped potential exists in the Foundation's current and potential donor base. As of June 30, 2017, just 11% of the Association's membership (1,700 out of a pool of 15,000) gave to the

annual campaign, with an average gift below \$200. The Director of Annual and Major Gifts will guide the overall fundraising strategy including annual, major, endowment and estate gifts with a primary focus on improving the Foundation's ability to grow the annual giving campaign. Although the assessment offers many recommendations for how best to identify, cultivate, solicit, steward and retain annual gift donors, the Director of Annual and Major Gifts will be the person who creates the final plan of action. The ideal candidate will have a proven history of soliciting and closing significant gifts and is skilled at developing processes for moving donors through the major gifts pipeline.

The assessment underscored the need to tell inspiring stories about the Foundation's philanthropic impact as well as to highlight the donors making it possible. The Director of Annual and Major Gifts will work collaboratively with the communications and marketing departments as the new messaging evolves and is evaluated. The Director of Annual and Major Gifts must be an excellent writer and storyteller with an authentic excitement for engaging prospects and donors in meaningful conversations. The ideal candidate will bring experience on the use of social media, in all its forms, as a vehicle in fundraising and stewardship.

Continuing the long history of volunteer leadership, the Director of Annual and Major Gifts will be the primary staff liaison with several Foundation committees and will be responsible for helping to recruit and train members, plan meetings and evaluate progress made towards goals.

The Foundation and Association share the beautiful, postmodern NC Bar Center building in Cary overlooking Lake Crabtree on Weston Parkway near I-40. The development team offices are located near each other where interaction is both natural and encouraged. The NC Bar Center, which has ample parking, is also the site for continuing legal education programs, Board, committee and section meetings, and other events, providing an excellent opportunity to interact with lawyers from across the state.

The Foundation's 60<sup>th</sup> anniversary is on the horizon, creating a sense of urgency the new Director of Annual and Major Gifts can use to celebrate the Foundation's service and to increase its presence within the state's legal community. This anniversary creates an excellent opportunity for an enterprising, strategic, and dynamic fundraiser to play a significant role in making a meaningful impact on the people of North Carolina now and for generations.

### **Responsibilities:**

- Provide visionary, strategic and operational leadership for all fundraising activities and, in collaboration with the fundraising team, use the recommendations in the assessment as a foundation.
- Lead the Annual Fund and major gift efforts, including but not limited to strategies for the cultivation, solicitation and stewardship of individual, foundation and corporate gifts, focusing on ways to move donors to greater engagement and support of Foundation programs and the Endowment.
- Initiate and assist in the implementation, monitoring and evaluation of an ambitious, diversified, written development plan and calendar for all development activities.
- Create and lead an effective prospect pipeline through wealth-screening research and strategic cultivation plans for major gifts.
- Manage a portfolio of major gift donors and provide support to the Executive Director and the Senior Director of the Foundation with their portfolios.
- Solicit and close gifts at all levels with a special emphasis on five and six-figure donations.

- Collaborate with Development Department staff to identify major gift and planned giving prospects.
- Provide staff leadership for volunteer Board committees including planning, training and reporting.
- Seek ways to maximize the Board's personal giving and participation in fundraising.
- Collaborate with the communications and marketing departments to ensure that development and marketing materials for print and social media have a unified and consistent message and look, and that they tell stories of impact about the Foundation's good works around the state. This includes, but is not limited to, fundraising materials, articles in the magazine, annual reports, newsletters, web pages, presentations and proposals.
- Oversee and evaluate all processes and procedures related to fundraising, including stewardship activities (donor database, acknowledgements, and recognition), gift acceptance policies and contributions management.
- Create, manage and monitor an annual development program budget in collaboration with the Senior Director.
- Create a supportive, collaborative, productive and healthy work environment based on respect, teamwork and clear expectations and responsibilities.
- Stay current on fundraising trends and innovations through active participation in professional development activities.
- Be a passionate and informed advocate for the Foundation and serve as one of its key spokespersons, actively seeking opportunities to participate in events that position the organization for improved fundraising or visibility.
- Develop a thorough knowledge of the Foundation's history, programs and major milestones, and the key leaders, volunteers and donors who have contributed to its success.

### **Education and Preferred Qualifications**

- Bachelor's degree required, higher degree preferred.
- 5-10+ years of progressively responsible fundraising experience and program management with a proven record of success achieving or exceeding ambitious revenue targets. Experience in fundraising with attorneys is a plus.
- Experience soliciting and closing five- and six-figure gifts.
- High degree of executive function including strategic thinking, proactivity, prioritization, development and use of effective operational systems, project and team management.
- Exceptional planning and organizational skills. Goal, results and detail-oriented with the ability to set and meet deadlines.
- Excellent written and oral communication skills including the professional and effective use of social media tools.
- Demonstrates integrity and diplomacy and treats colleagues, donors and volunteers with respect; maintains confidentiality and puts the needs of the organization ahead of personal ambition.
- Excellent listener, engages and develops rapport quickly, can build long-term relationships with a wide range of people.
- Active collaborator and enjoys working in teams, but also a self-starter who can work effectively solo without close oversight.
- Creative, naturally curious and eager to learn new skills.
- Smart, assertive and skilled in the full range of fundraising activities including annual giving, major gifts (especially \$10,000+), sponsorships, grants, special events and capital gifts. Experience with planned giving a plus.
- Experience creating, monitoring and evaluating successful fundraising plans and calendars.

- Proficiency using a donor database and Excel spreadsheets; knows how to create succinct and useful reports for planning, assessment and reporting on progress.
- Commitment to diversity and a history of working effectively with all people irrespective of their economic status, political affiliation, ethnicity, gender, educational level or sexual orientation.
- Eager and skilled networker who enjoys getting out into the community, attending events and participating in activities to position the organization for success.
- Flexible and adaptable work style with the ability to work some nights and weekends and manage competing demands. Travel across the state is required. Experience fundraising within a large region or entire state a plus.
- Sense of humor.
- Passion and commitment for the Foundation's mission and its importance to the people of North Carolina.

**Compensation:** Commensurate with experience and abilities and reflective of salary levels in nonprofit organizations.

**To apply:** Submit one document that includes your cover letter (providing your salary requirements and how you learned about the position) and your resume and send via email to:

Search Committee  
North Carolina Bar Foundation  
[NCBFsearch@mossandross.com](mailto:NCBFsearch@mossandross.com)

**Applications will be accepted through March 5, 2018 or until position is filled.** The North Carolina Bar Foundation is an Equal Opportunity Employer and values diversity in its workforce.

Writing samples, a short presentation and five references will be required from finalists.

The consulting firm of moss+ross ([www.mossandross.com](http://www.mossandross.com)) has been retained to assist with the search.