

Institutional Giving Officer

Certified Financial Planner Board of Standards (“CFP Board”) – headquartered in Washington, D.C. – is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP® certification.

CFP Board seeks a highly motivated Institutional Giving Officer to develop, execute, and expand the institutional fundraising activities of the Center for Financial Planning. The successful candidate will collaborate with internal and external constituencies to determine the best strategies for effective solicitation and stewardship of institutions, focused on creating a gratifying gift experience for all funders.

The ideal candidate will embrace open collaboration, possess intellectual curiosity, and help the organization deliver results towards fulfilling our mission.

Essential Functions:

- Partners with Director of Development to develop and implement plans to increase philanthropic revenue from institutional sources.
- Leads all aspects of identification, cultivation, solicitation, and stewardship for a portfolio of approximately 100 institutional funders and prospects.
- Identifies and researches new institutional prospects, prioritizes pipeline, and devises and executes engagement, cultivation, solicitation, recognition, and stewardship strategies for portfolio.
- Employs a strategic moves management approach to pipeline of institutional donors, moving funders from prospects to successfully closed gifts.
- Serves as the primary, direct contact for existing and potential major institutional funders; ensures appropriate and timely follow-up to inquiries.
- Develops and implements strategies to position the Center as a desirable charitable partner.
- Builds and maintains working knowledge of current and emerging Center programs, projects, and priorities; creatively packages Center programs for various institutions.
- Develops a data-driven approach for the identification of potential institutional partners.
- Tracks all interactions and related donor information in the Center’s database systems, including assisting with revenue projections and analytics.
- Evaluates all activities against mutually agreed upon KPIs to ensure that resources spent on fundraising yield intended impact.
- Pro-actively engages appropriate senior leadership and volunteer leaders in cultivation activities.
- Produces prospect letters of inquiry, proposals and reports, briefings, and associated documents in collaboration with Finance and Program teams.
- Maintains an accurate grants calendar, tracking all deliverables and timelines.

- Supports organizational communications including writing copy, appeal letters and content for newsletters and impact reports
- Performs other duties as assigned

Background/Skills/Abilities Preferred:

- Bachelors' degree in business or communications.
- A minimum of 7 years of professional work experience, with significant experience in Development, within an entrepreneurial non-profit environment strongly preferred.
- Demonstrated success with generating funding from institutional funding sources and proven track record in managing relationships with corporations and foundations, including cultivation, solicitation, and stewardship of high-level stakeholders, investing in six-to-seven-figure grants/gifts.
- Demonstrated ability to develop persuasive oral and written communications as well as presentations and collateral.
- Ability to conceptualize complex solutions to financial planning issues that will be compelling to solutions-oriented and data-driven funders.
- Advanced capabilities with data management, database optimization, and data analytics using Salesforce, NetForum, and other data systems.
- Highly developed organizational skills including exceptional attention to detail and follow-through, efficiency, and multi-tasking.
- Ability to work under pressure and handle numerous projects at any given time while delivering outstanding finished work product against deadlines.
- Supportive colleague with the ability to work both independently and collaboratively within a team environment
- Some travel required.

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Institutional Giving Officer position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled and collaborative staff.