

Manager, Stewardship & Engagement

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 Manager, Stewardship and Engagement to implement and manage comprehensive donor relations, stewardship, recognition, and retention programs that illustrates to donors the impact of their giving. The individual will provide excellent and energetic fundraising support for the Center for Financial Planning.

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, Development to build comprehensive and strategic plans for stewardship and donor relations.
- Partners with the Development team to create outreach plans that demonstrate appreciation, recognition, and engagement of donors; ensures donor giving experiences are managed appropriately.
- Communicates to donors regarding the impact of their gifts and monitors the use of the gifts to make certain the funds are being used in accordance to donor wishes.
- Identifies, researches, cultivates, and at times solicits a portfolio of donors and prospects in support of a comprehensive major gifts program (individual, corporate, foundation, planned, and online giving).
- Collaborates with internal and external partners to develop and create individualized stewardship and engagement plans, including communication, events, and outreach.
- Ensures the successful stewardship of individual and institutional donor relationships by managing appropriate frequency of outreach, communication, appreciation, and involvement.
- Collaborates with the Marketing and Communications teams to create and implement donor communications and acknowledgements related to cultivation and stewardship of partners.
- Collaborates on the development of proposals and other fundraising materials.
- Leverage existing Center programs and events to attract new partnerships.
- Ensures external reporting to donors on the impact of their gifts and investments; inputs and tracks engagement plan data, such as deliverables and biographical information/relationships, in various databases.
- Manages annual fund migration activities.
- Performs other duties as assigned.

Background/Skills/Abilities Preferred:

- Bachelors' degree or equivalent experience in business or communications.
- Minimum of 5 years of experience in stewardship/donor relations, donor communications and/or the donor cultivation cycle.
- Base of knowledge of all aspects of fundraising, and a proven ability to deliver strong, measurable results and meet fundraising goals.
- Ability to research and gather information effectively from a variety of sources.
- High-level of interpersonal skills demonstrated in interactions with individuals at all levels, inside and outside the organization.
- Strong organizational and project management skills; adept at working under tight deadlines and managing multiple projects simultaneously.
- Expert proficiency with Microsoft Office Suite, CRM database management; Salesforce and NetForum.
- Effective presentation skills, including creating polished PowerPoint decks for prospects and donors.
- High degree of initiative and ability to take an entrepreneurial approach.
- Detail-oriented self-starter and strategic thinker with high energy and the ability to work independently, accurately and on schedule.
- Error-free writer with strong proofreading skills and high attention to detail.
- Ability to prioritize and manage multiple projects and people simultaneously and follow through on tasks in a timely manner.
- Ability to exercise good judgment in sharing and communicating information.
- Able to handle confidential and sensitive information.
- Ability to work and collaborate as a part of a motivated, driven team.
- Some travel required.

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Manager, Stewardship & Engagement 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.