

EXECUTIVE POSITION PROFILE

Director of Development



This search is being conducted by:

VettedSolutions

Chicago, IL • Los Angeles, CA • Washington, DC

Telephone: +1.202.544.4749

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I. Opportunity

The **Director of Development (DoD)** will be expected to bring a highly successful fundraising operation to its next level by employing innovative methodologies which will provide strategic direction, leadership, and daily management of the Development staff at CFP Board - Center for Financial Planning. The DoD will oversee all aspects of fundraising, including institutional giving, and private philanthropy (annual giving, major gifts, and principal gifts), development operations, and stewardship. She/he will be a member of the Center's Senior Leadership team, reporting to the Managing Director and working closely with the Managing Director of Corporate Relations, CEO, CFO, other select staff, and Campaign Development Committee (CDC).

The DoD is the master fundraiser for Center for Financial Planning. She/he will serve as a mentor for the development team, and institute best practices in fundraising. The new DoD will write and execute annual plans to ensure that all entity fundraising operations continue to mature into fully functioning, robust fundraising department, which operates with a multi-disciplinary approach to increase revenue from individuals, foundations and corporations.

Responsibilities

- Generate at least \$3.5 million in new commitments to support the Center for Financial Planning programs, services, and activities.
 - Maintain a personal portfolio of 90-100 principal (\$500,000+) and major (\$50,000+) gift prospects moving each from identification through gift closure.
 - Lead institutional giving work, focused on gifts at the \$100,000+ level.
 - Establish and execute strategies that result in rising revenue, standards, and expectations.
 - Consult regularly with the Center's Managing Director, CEO, CFO, CDC along with other internal and volunteer leadership to develop fundraising goals, priorities, and short- and long-term strategic plans.
- Work closely with Development staff and senior leadership to continually monitor and analyze plan results and proactively intervene to address any areas where goals are not being met.
 - Hire, train, evaluate, develop, and manage members of the Development team.
 - Collaborate with senior leaders and Development team on identification, cultivation, and stewardship opportunities for donors and prospects.
 - Keep abreast of changing trends in philanthropy, tax and estate planning regulations, institutional giving, and plan accordingly to develop new programs which are responsive to the fundraising needs of Center for Financial Planning.
 - Design agendas for monthly CDC meetings.
 - Recommend candidates for new CDC membership to the Managing Director.
 - Oversee all Development departmental budgets.
 - Serve as a member of Center for Financial Planning's Senior Leadership team working collaboratively with colleagues to forward fundraising objectives.
 - Work collaboratively with Communications and Marketing team members to promote brand awareness, identify and communicate opportunities to increase awareness, and support the development of communication materials as needed.
 - Create and nurture a culture of philanthropy throughout the organization.

One-year Portfolio and Frontline Fundraising Goal

- **3 months:** Develop cultivation and solicitation plans for all prospects in the DoD portfolio and make initial introductions to 50%.
- **6 months:** Active cultivation is underway, with meaningful qualification, solicitation, and stewardship activity progress demonstrated; has met all CDC members.

- **9 months:** Utilizing relationships, identify additional prospects for cultivation and solicitation in year two.
- **1 year:** Significant solicitation activity and progress toward goal; has met all CDC members and CFP Board – Board members.

In addition to at least 10 years of fundraising experience, including experience at the senior management level in a large nonprofit, strong candidates will have a proven track record in major gifts and corporate, foundation experience and be rigorous, highly strategic, and entrepreneurial individuals. They will ideally also possess the following skills and characteristics:

- Experience leading a fundraising department raising at least \$5MM per year preferred, and a track record of setting and meeting or exceeding ambitious goals for a major nonprofit.
- Strong management skills including experience supervising staff members.
- Demonstrate comfort engaging with high-net-worth individuals in diverse philanthropic cultural contexts, and a track record of personal success in asking and closing seven- and eight-figure gifts.
- Experience building relationships with foundations.
- Experience with development planning at the senior level, implementing multi-unit fundraising models and strategies.
- Strong metrics orientation, including proven skills in budget management, managing a large team, goal setting, and the accurate reporting of performance against those goals.
- Excellence in managing diverse teams.
- Experience working effectively with volunteer committee members.
- Able and willing to travel extensively (50%); able and willing to travel and work outside normal business hours, as needed.
- A passion for the work of Center for Financial Planning and a desire to continually broaden and deepen the organization's impact.
- Experience with fundraising campaigns preferred.
- Superior oral and written presentation skills.
- A working knowledge of fundraising software (e.g., NetForum) and CRM Platforms, such as Salesforce.
- Patient listener, likable, diplomatic, and engaging.
- Collaborative, inclusive, and team driven.
- Skilled manager, mentor, and team builder.
- History of success in positions of increasing responsibility.
- Bachelor's degree is required, master's degree a plus.

II. Organizational Overview

About CFP Board

Certified Financial Planner Board of Standards, Inc. is the professional body for personal financial planners in the U.S. CFP Board sets standards for financial planning and administers the prestigious CFP® certification — one of the most respected certifications in financial services — so that the public has access to and benefits from competent and

ethical financial planning. CFP Board, along with its Center for Financial Planning, is committed to increasing the public's awareness of CFP® certification and access to a diverse, ethical and competent financial planning workforce. Widely recognized by firms and consumer groups as the standard for financial planning, CFP® certification is held by over 86,000 people in the United States.

About Center for Financial Planning

The Center for Financial Planning is an initiative of CFP Board.

The financial planning profession faces significant challenges as its workforce ages while Americans' demand for financial planners continues to increase. The current workforce does not represent the diversity of the public that it serves. The profession faces a shortage of qualified faculty to teach the next generation of financial planners and conduct academic research that contributes to the financial planning body of knowledge.

These challenges are larger than any one organization or firm can tackle on their own and require a unified effort across all corners of the profession. The CFP Board Center for Financial Planning serves as the catalyst—bringing together CFP® professionals,

firms, educators, researchers and experts—to address these challenges and build a more diverse and sustainable financial planning profession that can secure the financial future of all Americans.

CFP Board Headquarters

1425 K Street, NW
Suite 800
Washington, DC 20005

Digital Presence

Web: www.centerforfinancialplanning.org
www.cfp.net
Twitter: [@CFPBoard](https://twitter.com/CFPBoard)
Instagram: [@CFPboard_Center](https://www.instagram.com/CFPboard_Center)
Facebook: [@CertifiedFinancialPlannerBoard ofStandards](https://www.facebook.com/CertifiedFinancialPlannerBoardofStandards)

III. About Vetted Solutions

Vetted Solutions is a Washington, D.C. based executive search firm specializing in serving the association and nonprofit sectors. We focus on CEO and senior staff positions. For confidential consideration, please email your resume and cover letter to CFPBOARDDoDsearch@vettedolutions.com or contact Vetted Solutions at +1 202 544 4749.

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