



## **Planned Giving Officer Position Announcement**

**Job Title:** Planned Giving Officer  
**Reports to:** Director of Philanthropy  
**Status:** Full Time, Exempt

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It's an exciting time to work for Sonoma Land Trust (SLT), especially within the small but mighty Philanthropy team. The organization is in the midst of successful comprehensive campaign, A Force for Nature, which has raised nearly \$80 million over the past five years. The Planned Giving Officer has an opportunity to make a substantial impact by building our Legacy League, a giving circle for those who have included Sonoma Land Trust in their estate plans, as well as cultivating, soliciting and stewarding donors able to make annual gifts of \$10,000 and up. Our mission of protecting the land forever is closely aligned with our supporters' desires of leaving a legacy of healthy landscapes and resilient communities. This is a remote-hybrid position, working two days in the office. Join this award-winning and nationally recognized organization and create local impact in Sonoma County and throughout the northern San Francisco Bay area.

SLT has been intentionally working on its diversity, equity and inclusion goals for several years and serves a diverse audience with broad cultural heritages, socioeconomic backgrounds, genders, and orientations. We encourage applications from candidates who reflect and value the audiences and populations we serve.

### **Overview**

The Planned Giving Officer directs the Legacy League Program. The Legacy League is Sonoma Land Trust's recognition circle for those who have let us know that they have included Sonoma Land Trust in their estate plans. This position also helps develop and implement individual plans for selected donors, soliciting donations, working with other members of the Philanthropy Team, Finance Team and Marketing Team and program staff on solicitations and campaigns.

### **Primary Responsibilities**

#### **Working with Donors and Prospects**

- Manages portfolio of up to 150 planned giving donors and prospects and major donors (70% planned giving prospects, 30 % major donors).
- Researches, identifies, contacts planned giving and major donor prospects to foster relationships with donors through regular engagement; conducts face to face visits in Sonoma County and in the greater Bay Area.
- Works with donors to secure and formalize annual and planned gift commitments.
- Responds in timely manner to all planned gift inquiries and follows up appropriately.

#### **Strengthening Organization Capacity**

- Attends events and sometimes presents about Sonoma Land Trust, educating people about Sonoma Land Trust's work and opportunities to get involved.
- Attends planned giving seminars and participates in continued education to maintain current knowledge.
- Work with Finance Department to communicate with estate planners, financial planners, lawyers about incoming planned gifts.
- Assisting major gift officers and donors in other people's portfolios with planned giving questions.
- Work with Database Administrator to ensure data is entered and able to be queried for reports and tracking.

### **Assist with Communications and Marketing**

- Develop strategies for promoting planned giving program to prospective supporters in the community, including through strategic partnerships with advisors, attorneys and others.
- Partner with our internal team and our external marketing agency to identify opportunities and develop marketing strategies to expand our planned giving program.

### **Essential Qualifications**

- Bachelor's degree or four years of fundraising and/or estate planning experience or related experience required.
- Experience cultivating and closing legacy giving, estate planning and charitable gifts of five figures or higher or working with clients in estate or financial planning.
- The ability to move individuals through a process of developing deeper appreciation for the mission of an organization and increasing their giving.
- Excellent phone and email skills, adept in developing trust and rapport over the phone or email.
- Persuasive communication with excellent interpersonal and written communication skills.
- Ability to understand the importance of and maintain confidentiality.
- Knowledge of Microsoft Office applications (Word, Excel, PowerPoint) or comparable software.
- Ability to participate in donor events, including occasional evenings and weekends, and travel to donor meetings throughout the Bay Area.

### **Preferred Skills and Experience**

- Five or more years of experience in prospect management, donor cultivation, and solicitation (or comparable experience in estate, tax, or financial planning or wealth management).
- Strong cultural competence and experience with diverse communities.
- Experience with fundraising databases and CRM software.
- Experience working closely with high net-worth individuals, families, and professional advisors.
- Appreciate land conservation and nature.
- Knowledge of estate planning techniques and principles.

### **You are encouraged to apply if you have the following:**

- An understanding of the core principles of planned giving.
- An interest in taking a successful, established fundraising program to the next level.
- A passion for relationship building with a dynamic portfolio of donors and supporters.
- A desire to work for a smart, supportive, collaborative team.
- An authentic interest in maximizing SLT's impact on the ground for the benefit of our community and our planet.

### **Schedule, Salary & Benefits**

Position is 40 hours per week.

Salary starting at \$107,000 commensurate with experience. Benefits include generous employer contributions to medical, dental and vision insurance plans. Employer contribution to retirement plan after 1 year of employment. Paid time off includes 15 paid holidays, paid vacation based on tenure, and personal and parental leave in accordance with SLT policies and procedures.

This position is located at the Sonoma Land Trust office in Santa Rosa, California. Staff are working in a hybrid model.

### **About Sonoma Land Trust**

Sonoma Land Trust works in alliance with nature to conserve and restore the integrity of the land, with a focus on climate resiliency. The organization is also committed to ensuring more equitable access to the outdoors. Since

1976, the non-profit Land Trust has protected more than 58,000 acres of scenic, natural, agricultural and open land for future generations. Sonoma Land Trust is accredited by the Land Trust Accreditation Commission and was the recipient of the 2019 Land Trust Alliance Award of Excellence. For more information, please visit [Sonoma Land Trust's website](#).

We are passionate about building and sustaining an inclusive and equitable working environment that is representative of the communities we serve. We know that having varied perspectives leads to better outcomes to solve the complex problems of conservation, climate change and environmental justice in Sonoma County.

**To Apply**

Please email your resume and cover letter to [staffing@sonomalandtrust.org](mailto:staffing@sonomalandtrust.org).

**Sonoma Land Trust is an Equal Opportunity Employer**

We strive to create a diverse and inclusive organization and encourage applicants from all cultures, races, colors, religions, national or regional origins, sexes, ages, disability status, sexual orientations, gender identities, military or veteran status or other status protected by law.