



# SENIOR DIRECTOR OF DEVELOPMENT, GIFT PLANNING

ByalaSearch LLC is pleased to announce that our firm has been retained by the Greater Boston Food Bank to identify candidates for the position of Senior Director of Development, Gift Planning.

## ABOUT THE GREATER BOSTON FOOD BANK

GBFB is the largest hunger-relief organization in New England and among the largest food banks in the country. Since its founding in 1981, it has been clear about its mission: To create a hunger-free Eastern Massachusetts for the 190 communities it serves, from Boston to the Cape to Worcester. We are committed to increasing our food distribution to provide three meals a day to every person in need in Eastern Massachusetts while supporting healthy lives and healthy communities.

Through the compassion and commitment of our supporters, staff, partners and volunteers, The Greater Boston Food Bank (GBFB) takes a bold, innovative and multi-pronged approach to achieve our mission to end hunger here through food acquisition and distribution and advocacy for local and national policies that work to curb and eradicate hunger.

Approaching fifty years old, the GBFB has continuously grown and expanded its efforts. In 1974, Kip Tiernan started to distribute food from her station wagon to those in need and later founded what we now know as The Greater Boston Food Bank (GBFB). From these humble beginnings, we have grown into the leading hunger-relief agency in New England and one of the largest in the country. Today GBFB provides over 109 million pounds of healthy food each year to more than 600 distribution sites across Eastern Massachusetts. That healthy food passes through GBFB before being distributed through more than 600 partner agencies and direct distribution sites such as: Food Pantries, Soup Kitchens,



Community Meal Programs, Senior Centers, Veterans, Afterschool organizations and more. Our partner agencies place food orders through our online inventory system and pick up their orders at our warehouse in Boston. For some partner agencies that are located too far from GBFB's warehouse for regular pick-ups or have transportation challenges, GBFB operates several cross-dock locations across Eastern Massachusetts. The transportation challenges of these agencies are accommodated by bringing food to convenient, central locations to ensure they get the critical food on which their community members rely.

GBFB acquires food through food industry product donations and financial contributions that enable us to purchase high-nutrient quality food. We also benefit from the generosity of over 12,000 volunteers annually who help to sort, pack and distribute food products. GBFB works to acquire, store, organize and distribute food through local food pantries, community meal programs, homeless and residential shelters, youth programs, veteran programs, senior centers, and day-care centers, each embedded in communities throughout the nine counties of eastern Massachusetts. With hunger increasing in Massachusetts, the need for GBFB and its services only increases. The need is great: one in three Massachusetts households experiences food insecurity, or the lack of consistent access to adequate food. 21.9% of Massachusetts households with children do not have access to sufficient or healthy food, according to a US Census Survey. Food insecurity rates, which are higher for Black and Hispanic residents, were exacerbated by the pandemic. Just 19% of all Massachusetts households experienced food insecurity in 2019. This jumped to 30% in 2020, 32% in 2021, and 33% in 2022.

In November 2023, O'Neil Outar joined GBFB as Executive Vice President leading the Advancement Division overseeing communications, fundraising, marketing, public affairs, and public relations. Prior to joining GBFB, O'Neil spent 30 years in senior fundraising and engagement management roles at leading global research institutions, most recently at Rhode Island School of Design where he served as Vice President of Advancement. He is known as an impact leader who has worked to transform organizations through building advancement organizations and securing transformative gifts.



GBFB Advancement is undergoing a rebuilding to create an organization and program that can support the demands of growing food insecurity in the region. GBFB raises approximately \$40 million in cash annually and is considered one of the most respected nonprofits in Greater Boston. During the COVID-19 pandemic, GBFB saw donors and dollars surge (both more than tripled) in response to public awareness of growing food insecurity in the region. Since the pandemic, GBFB Advancement has been tasked with building a best-in-class organization to increase fundraising to meet increasing and ongoing needs. In addition to the funding they provide, partner corporations and foundations play an essential role in increasing visibility of food insecurity in our communities. Priorities for the new organization include new stewardship programs, enabling infrastructure, and planned giving.

## PRIMARY FUNCTION

Reporting to the Vice President of Philanthropic Partnerships, the Senior Director of Development, Gift Planning has two primary responsibilities:

- Manage a portfolio of approximately 75 prospective individual major donors (\$10,000+ annually)
- Develop and implement a comprehensive program to grow and steward individual donors who make gifts through bequests, life income funds, donor-advised funds, family foundations, or other assets (including, but not limited to real estate, privately held securities, intellectual property, collections, or other tangible property)

The ideal candidate will be an experienced fundraiser with a proven track record of success in major gifts and gift planning. This position participates in the management, administration, marketing and strategic direction of gift planning.



Collaborate with fundraisers to identify and develop marketing strategies for potential gift planning donors.

## POSITION DESCRIPTION

### Role and Responsibilities:

- Develop and manage a portfolio of approximately 75+ prospective major donors (\$10,000+ annually). Maintain a rigorous schedule of meaningful contacts (at least 75 visits and/or video conferences annually) creating moves management plans related to them that include strategies of engagement and solicitation.
- Manage ongoing cultivation and stewardship of donors and track all constituent data and activities in Salesforce.
- Forge relationships and collaborate with other members of the Advancement team to identify and engage potential major donors with creative gift arrangements.
- Work with donors and their professional advisors to facilitate, consult on and close creative and complex gifts of non-liquid and alternative assets, oversee GBFB's relationship with an estate and settlement to facilitate realized bequests in a timely and efficient manner.
- In partnership with the Vice President, Philanthropic Partnerships, help develop and manage a life income fund program.
- Identify and develop marketing strategies for gift planning with vendor and internal partners including direct marketing, newsletters, public awareness campaigns, and strategic partnerships.
- Identify emerging financial and estate planning trends with special emphasis on incorporating them in solicitation of potential major gift donors.



- Use understanding of technical aspects of planned gift vehicles and the relevant tax and estate consequences of these vehicles and use them to enhance GBFB's fundraising efforts.
- In partnership with the Director of Donor Relations, develop and maintain a high-quality stewardship process for bequest and life income fund donors, including a legacy donor recognition society.
- Organize and conduct internal training on charitable planning tools that will assist fundraisers, volunteers and the Executive Leadership Team. Serve as an educational and consultative resource to frontline fundraisers, leadership and volunteers in executing planned giving techniques and strategies for prospective major donors, as appropriate.
- Perform related duties as requested.

**Metrics Competencies for Success:**

- Devise personalized engagement plans to identify, cultivate, solicit, and steward a portfolio of approximately 75 high-potential prospective individual major donors.
- Complete complex gift arrangements, working with donors and their professional advisors. May facilitate, consult on and close gifts of non-liquid and alternative assets, oversee GBFB's relationship with an estate and settlement to facilitate realized bequests in a timely and efficient manner; help develop and manage a life income fund program; and organize and conduct internal training on charitable planning tools that will assist fundraisers, volunteers and the Executive Leadership Team.
- Serve as an educational and consultative resource aiding fundraisers, the Executive Leadership Team, and volunteers in executing planned giving techniques and strategies, as appropriate. Maintains knowledge of relevant tax law and estate consequences of complex gift vehicles and how they can be used to advance GBFB's fundraising efforts.

## **Ideal Skills and Experience:**

- Bachelor's degree in relevant field required. Advanced degree in relevant field, (business administration, tax or law) or rigorous professional designation (Certified Financial Planner™ (CFP), CPA, securities license) and/or designation as Chartered Advisor in Philanthropy® preferred.
- Minimum of seven years' experience in fundraising or working with high-net-worth individuals through a family office, private banking, financial services, financial planning or related professions.
- Individual and team success in securing and maintaining 6+ figure accounts and/or philanthropy. Program strategy development and execution experience.
- Demonstrated ability in prospect identification, relationship building, strategizing and solicitation of charitable planned gifts or similar estate planning experience.
- Must possess an understanding of best practices and reporting as defined by the National Association of Charitable Gift Planners (CGP).
- Demonstrated knowledge in estate planning techniques, tax law and the general body of statutory, regulatory, and case law regarding planned gifts. Ability to work collaboratively with GBFB and external accounting, finance and legal counsel.
- Proven ability to manage complex organizational relationships and work effectively with executive leadership; ability to work within the constructs of a hybrid environment, and to supervise and motivate staff members who work remotely.
- Excellent verbal and written communication and presentation skills. Demonstrated ability to write and present persuasively.



- Strong organizational skills.
- Demonstrated effectiveness in outreach to volunteers and other fundraising partners.
- Experience in developing and marketing charitable gift arrangements.
- Demonstrates the required digital competencies that result in the effective usage of the full range of digital technologies at GBFB; Proficiency in Microsoft Office Suite (Word, PowerPoint, Excel, Outlook). Salesforce and/or Raiser's Edge database experience a must; familiarity with Planned Giving platforms such as Pentera, Stetler, FreeWill, or others.
- Ability and willingness to travel within Massachusetts.

**Critical Competencies for Success:**

- Demonstrated track record of using moves management to cultivate, solicit and close planned gifts and steward donors at the five, six and seven figure levels
- Ability to move from introductory to solicitation to close phases with minimal supervision, connecting to planned gift prospects in strategic and meaningful ways to deepen relationships
- History of moving donors along and up the giving pipeline
- Actively contributing to building an organizational culture and bringing best practices in philanthropy to an institution

**Other Characteristics:**

Personal motivation combined with dedication to GBFB's mission are essential to the Senior Director of Development, Gift Planning. The successful candidate will be collaborative and demonstrate flexibility in adapting to shifting institutional priorities in a fast-paced environment



and must possess the maturity, poise, and sophistication to understand and manage complex relationships with both colleagues and high-net worth individuals. They will have demonstrated expertise in philanthropy and its best practices, making them a trusted advisor to the Vice President of Philanthropy Partnerships and the rest of the philanthropy team and greater organizational team.

The Senior Director of Development, Gift Planning will have a demonstrated ability to bring team spirit, enthusiasm and integrity to the role to motivate and achieve results. The placement is expected to be a self-starter who is adept at working independently and as part of a small team in a building environment, equally skilled at being entrepreneurial and deeply collaborative. The placement will possess the demonstrated ability to manage competing demands and the changing pace of priorities on behalf of the Greater Boston Food Bank.

## WORK ENVIRONMENT

The current work environment is hybrid, mostly remote and in the office 2-3 days a week.

## COMPENSATION

The compensation for the Senior Director of Development, Gift Planning is targeted at \$135,000 to \$175,000.





## KINDLY SEND NOMINATIONS OR EXPRESSIONS OF INTEREST TO:

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