

# **Greater Houston Community Foundation General Counsel & Vice President of Planned Giving**

## **ABOUT GHCF**

Since 1995, [Greater Houston Community Foundation](#) has helped Houston thrive by convening philanthropic resources and knowledge to drive philanthropy in our community, distributing over \$1.73 billion in grants over the past 26 years. Through various charitable vehicles, including donor-advised funds, the Foundation partners with donors to meet their objectives by supporting grantmaking, including providing programming, advising and educational opportunities for donors to maximize their philanthropic impact.

Greater Houston Community Foundation is widely considered to be the go-to partner for high-profile philanthropic partnerships in the Greater Houston area, including major disaster relief initiatives, such as the Hurricane Harvey Relief Fund as well as the Bush-Clinton Katrina Fund.

The Foundation leads collaborations that support the wellbeing and vitality of Houston including Understanding Houston, a regional indicators partnership with the Kinder Institute for Urban Research that provides key data for philanthropists, business and nonprofit leaders, to drive decision-making in important areas of investment in Houston including economic opportunity, housing and education.

## **POSITION SUMMARY**

[Greater Houston Community Foundation](#) seeks a General Counsel & Vice President of Planned Giving. The General Counsel & Vice President of Planned Giving serves as internal lead legal counsel for the Foundation and as primary liaison with outside counsel. In addition, the position is responsible for providing key support for the Foundation's planned giving program, including attracting and retaining new outright and planned gifts from donors. This person will provide deep technical legal knowledge in this context to help enable the Foundation to attract a greatly increased level of planned gifts.

This position requires a strong commitment to working in a team environment, adaptability, sound organization skills, and the ability to manage relationships. Strong interpersonal and communication skills and the ability to help architect planned gifts are important. This position will report to the President & CEO and will be an important member of the senior leadership team.

## **KEY RESPONSIBILITIES**

The General Counsel manages the legal duties and responsibilities of the Foundation to protect the interests of the Foundation and to ensure that all laws and IRS requirements are followed.

As VP of Planned Giving, this individual is a relationship-focused, subject matter expert who will serve as the go-to institutional resource for complex planned giving strategies and knowledge. This individual will serve as a resource internally for the senior leadership team and relationship managers in working with donors and advisors on complex charitable gifts, in addition to managing a portfolio of donors and prospects with a focus on planned and deferred giving. In this role, the individual will be accountable for setting and meeting annual business development goals.

This individual possesses a high level of knowledge around diverse giving vehicles and strategies including trusts, annuities, retirement plans, bequests, business interests, real estate, closely-held stock and other types of complex assets. Strong knowledge of estate planning and tax law is important. Knowledge of and working experience with impact investments and complex grant-making arrangements are also desirable.

This position will support raising the visibility of Greater Houston Community Foundation among donors

and their advisors and furthering the Foundation's strategic vision to be "Houston's leader in philanthropic solutions."

Reporting directly to the President & CEO on assessing and managing corporate legal issues, this individual also works very closely with the Chief Financial Officer in this context, and with the Chief Advancement Officer to support the overall growth of the organization, as well as the Vice President of Personal and Family Philanthropy on legacy planning and the Senior Director of Advisor Relations on work with the professional advisor community.

### **Major Functions**

- Serve as in-house counsel and manage all legal matters for the Foundation, including gift acceptance and agreements, as well as general policy and procedure review and legal matters.
- Create and implement planned gift strategies to secure major and deferred gifts from prospective and current donors. Responsibilities include educating and advising donors and staff on gift types and strategies that maximize charitable impact.
- Manage and grow a personal portfolio of prospects and donors. Responsibilities include providing support for the growth of the Legacy Society, a donor recognition society for planned gift donors.
- Manage all Foundation legal issues and advise senior management on all relevant legal matters.
- Create and manage internal legal policies and procedures.
- Review and approve all contracts, including vendor contracts and grant agreements and develop systems for tracking and maintaining records of same.
- Serve as primary liaison to outside counsel.
- Work with donors, prospects, and professional advisors on complex gifts.
- Create customized proposals and resource documentation for prospects.
- Draft and review gift agreements and policies.
- Undertake comprehensive review of all fund agreement forms and manage ongoing form maintenance.
- Develop gift illustrations for use in marketing materials.
- Manage end-to-end process for complex gift acceptance.
- Develop and institute protocols, best practices, and processes that will drive greater efficiencies within the organization related to gift acceptance.

### **DESIRED QUALIFICATIONS**

We seek a team member that thrives on challenges and is comfortable in a fast-paced, demanding environment. The successful candidate will have a proven track record of success in working collaboratively and leading work on complex legal matters.

Specifically, the successful candidate will possess:

- Advanced law degree required; licensed Texas attorney preferred.
- Minimum five years of experience in planned giving and/or estate planning.
- Successful track record of working as a practicing attorney in fields of contract and/or tax law.
- Successful track record of developing and administering planned and deferred gifts.
- Excellent communication and presentation skills (both written and verbal).
- A high degree of professionalism, confidence and flexibility that allows the incumbent to work collaboratively and effectively with clients and colleagues of diverse backgrounds.
- Excellent ability to prioritize, organize, and manage multiple competing assignments and responsibilities and communicate effectively regarding progress to deliverables.
- Good sense of self with demonstrated qualities of self-motivation, integrity, loyalty, discretion, and reliability.
- Values accuracy and commitment to excellence.

- Strong organizational skills and attention to detail.
- Ability to prioritize work and adjust to multiple time-sensitive demands.
- Ability to implement strategy and deliver results.
- Customer service-focused approach to relationship development.
- Entrepreneurial mindset.
- Confident, driven, and dynamic leader.
- Willingness to work on additional projects as needed.

**COMPENSATION**

Salary will be set in accordance with the successful candidate’s experience. In addition to salary, the candidate will participate in robust employee benefits plans, including comprehensive health and dental insurance coverage, generous PTO plan, and 401(k) with an organizational matching component.

**TO APPLY**

Please apply [here](#). Applications should be submitted by **January 31, 2022**. We will contact those candidates who most closely match our requirements. We thank you in advance for your interest.

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The statements herein are intended to describe the general nature and level of work being performed by employees and are not to be construed as an exhaustive list of responsibilities, duties and skills required of personnel so classified. Furthermore, they do not establish a contract for employment and are subject to change at the discretion of the employer.

GHCF is an Equal Opportunity Employer and does not discriminate against a job applicant or an employee because of a person’s race, color, religion, sex (including pregnancy, gender identity and sexual orientation), national origin, age (40 or older), disability or genetic information. GHCF does not discriminate against a person because the person complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.