

**Director, Strategic Partnerships and Planned Giving**  
**Competitive Enterprise Institute**  
**Washington, D.C.**

Summary

The Competitive Enterprise Institute seeks a seasoned professional with proven major gift experience to serve as CEI's Director of Strategic Partnerships and Planned Giving. Candidates will show a desire to be part of a dedicated philanthropy team that's committed to a strong growth trajectory. This is a fast-paced position for a self-disciplined, organized individual with 8-15 years of experience who thrives on challenges. Initial travel is projected at 20 percent with eventual travel up to 40 percent. This position reports to the Vice President of Philanthropy.

CEI is a fun, creative environment built around experienced policy leaders. Departments have metrics-based accountability, but little bureaucracy. The VP Philanthropy – and the entire leadership team – desire to provide increasing levels of responsibility to their team members. There is an emphasis on personal growth and professional development.

Job Description

**60 percent: Cultivation and growth of a donor portfolio.**

- Maintain a portfolio of 150-200 donors established donors;
- Actively cultivate individual donors and grow their involvement with CEI;
- Travel and meet with donors;
- Maintain Salesforce notes on donor portfolio;
- Look for ways to engage new donors.

**25 percent: Project building and management**

- Grow and manage a planned giving program and portfolio;
- Plan and execute regional fundraising events, including effective follow-up;
- Eventually – responsible for the supervision of CEI's direct mail program.

**15 percent: Team Assistance**

- Assist the entire team with important projects;
- Do additional calls for team members and add additional Salesforce notes as needed;
- Serve as an able editor for grant proposals as necessary.

Characteristics

If you believe that this position may be a good fit, these words will describe you:

- **Team Player.** CEI's philanthropy team is a close-knit, highly energetic five-person team that works hard (and sometimes works long hours) to serve the organization and its many donors.
- **Discreet.** You have a lifelong commitment to discretion. You are comfortable handling highly confidential materials.
- **Experienced in Major Gift Fundraising.** You are an intuitive relationship builder and have the intrinsic skills necessary to easily and quickly establish rapport with donors. You have been a major gift fundraiser on some level and are a gracious individual that

maintains a highly professional demeanor at all times. You're comfortable being on the road at least 20 percent of the time (eventually up to 40 percent), and you know when and how to make an ask. You don't waste time, and understand that building a major gift portfolio takes a lot of seemingly routine, but critically important, day-to-day cultivation.

- **Teachable.** You are eager to work with a manager who has created a holistic strategic fundraising plan, as part of a team-based department. You are willing to learn and do new and innovative things. For example, if you don't have a background in direct mail, you're willing to learn mail and possibly add that complex process to your portfolio of knowledge.
- **Self-Starter.** You are able to jump into projects and build them and move them. You know when to ask for help but you don't need hand-holding. You're comfortable receiving increasing autonomy to manage your own workload and important processes.
- **Multi-Tasker.** You thrive in an environment that demands multi-tasking.
- **Focused.** You are able to laser-focus on specific tasks at hand for specific periods of time. While skilled at multi-tasking, you know how to avoid being distracted. You drive yourself to get the job done.
- **Curious and Policy-Minded.** You like public policy and are curious enough to enjoy the challenge of taking complex policy ideas and distilling them in ways that are both factually accurate and interesting to potential grant-makers.
- **Planner.** You enjoy planning and executing complex processes.
- **Deadline Driven.** You are personally punctual. You are deadline-driven. Making the trains run on time and meeting deadlines are simply part of your DNA.
- **Flexible.** You easily maintain a positive, flexible attitude when priorities shift. You know how to fail gracefully and own mistakes. And you don't take it personally when a donor declines to make a gift.
- **Aligned.** You identify as libertarian or conservative and can discuss your philosophical alignment with CEI's mission and vision, particularly related to energy, regulatory policy, and free market economics. Please see the CEI website, [cei.org](http://cei.org), for a deeper understanding of the organization's policy agenda.

#### Of Note

**Culture matters.** CEI is a feisty think tank led by a high-energy President/CEO. Members of the philanthropy team work hard, have a good sense of humor, enjoy life, and are intensely dedicated to an upward trajectory of growth for the organization.

The CEI office is located in **downtown Washington, D.C.**, which has well established mass transit that makes it easy to find affordable housing and still work in the District of Columbia. Telecommuting is not offered, nor are relocation expenses.

#### About CEI

The Competitive Enterprise Institute is a non-profit public policy organization dedicated to advancing the principles of limited government, free enterprise, and individual liberty. Our

mission is to promote both freedom and fairness by making good policy good politics. We make the uncompromising case for economic freedom because we believe it is essential for entrepreneurship, innovation, and prosperity to flourish. Unique among free market groups, CEI pursues a full-service approach to advancing public policy. Founded in 1984, CEI has grown into an effective advocate for freedom on a wide range of critical policy issues, including energy, environment, business and finance, technology, telecommunications, and food and drug regulation.

### How to Apply

Qualified candidates should submit the following application materials in one PDF:

- Resume
- Cover letter detailing your philosophical interest in this opportunity and your salary requirements
- 2 writing samples (max 3 pages each)
- List of 4+ references (professional & personal)

Please include “Director, SPPG, CEI– Your Name” in the subject line of your email. Materials should be emailed to Claire Dixon, Executive Director of Talent Market, who is assisting with the search: [claire@talentmarket.org](mailto:claire@talentmarket.org).

While we thank all applicants for their interest in this position, we are only able to contact those to whom we can offer an interview. No phone calls, please.