



JOB DESCRIPTION

Position : Chief Endowment and Family Philanthropy Officer
Department : Financial Resource Development (FRD)
Reports to : Chief Executive Officer

Position Overview:

Working with the Chief Executive Officer and volunteer leadership, the Chief Endowment and Family Philanthropy Officer sits on the Management Team and is the senior executive responsible for leading efforts to achieve the overall endowment, planned giving, and multi-generational philanthropy objectives for the Jewish Federation of Greater Washington. This person will develop strategies and tactics to grow the Federation Endowment and ensure long-term relationships with key multi-generational donors families to Federation. This person will lead a team comprised of approximately 4 professionals in all areas of planned giving and endowment, donor advised funds, donor relations and stewardship, and next generation/family philanthropy, while coordinating lay and staff resources to meet or exceed established goals and objectives within the Endowment arena and within Federation as a whole.

Primary Responsibilities

Planned Giving and Endowment

- Serves as lead professional in growing Federation's United Jewish Endowment Fund (UJEF)
 - including unrestricted, field of interest and Donor Advised Funds
- Develops comprehensive planned giving strategies in partnership with key lay leaders
- Serves as Federation and community champion of the UJEF
- Manages and directs all development aspects related to UJEF including:
 - Philanthropic Funds, Life Income Plans, Designated Funds
 - Perpetual Annual Campaign Endowment Funds (PACE)
 - Lion of Judah Endowments (LOJE)
 - Supporting Foundations
 - Allied Professional Program
 - Agency/Congregation Endowment Campaigns
 - Life Insurance Program
- Works in partnership with marketing and donor relations teams to develop necessary systems and procedures for expansion and operations of the UJEF
- Initiates endowment conversations and partners with colleagues to create planned giving opportunities within Philanthropic Leadership, The Network, Young Leadership and Community Campaign
- Develops effective strategies for cultivating, soliciting and stewarding prospects, through the organization and partner with FRD staff in their effecting implementation

- Provides professional support to lay leadership to identify, initiate, and develop solicitation efforts, enhance current initiatives and implement fundraising activities
- Enhance the visibility and stature of the Endowment Fund within the allied professional community and with its donor base
- Partners with President of UJEF and staffs appropriate lay committees
- Develops and maintains UJEF department budget

Next Gen / Family Philanthropy

- Oversees the Federation's *Next Gen Philanthropy* initiative including existing programs as well as the development of new initiatives to significantly expand engagement of multi-generational families in the Federation
- Works in close partnership with other FRD staff to identify and engage multi-generational families in the work of Federation
- Serves as primary relationship manager and solicitor of appropriate multi-generational families

Organizational Leader

- Serves as leader within Federation as member of the Management Team
- Provides strategic direction to ensure the successful execution and achievement of tasks that impact the success of the organization
- Acts as leader and resource throughout the greater Washington Jewish community

Minimum Requirements:

Education:

- Bachelor's Degree; Advanced degree preferred

Experience:

- Minimum 7-10 years of senior level management experience and progressively responsible development experience
- Strong track record in planned giving and endowment; well versed in various giving vehicles
- Proven track record in managing staff and budgets
- Proven history of successfully staffing senior level volunteer stakeholders

Skills/Competencies:

- Experience in the planning and successful implementation of a multi-disciplined development program as well as working knowledge of all aspects of development
- Demonstrated ability to work effectively with prominent volunteers, providing them with support and guidance; the intellectual depth, maturity, wisdom and discretion to garner their trust
- Demonstrated success in cultivating, soliciting and stewarding major gifts from individuals at six and seven-figure levels in order to accomplish ambitious financial goals
- Experience as a member of senior management staff, bringing development expertise to strategic discussions
- Team leader with the ability to attract and retain highly qualified professional staff and to provide mentoring and opportunities for growth to staff

- Management experience in a complex organization along with a successful track record in multi-constituency, consensus-driven cultures
- Flexibility and creativity; the ability to thrive in a dynamic, entrepreneurial setting
- Deep appreciation for and an ability to articulate powerfully the values and vision of the Federation
- Strong organizational skills
- Strong communications skills
- Intimate knowledge of Jewish Community, customs and practices.

Other:

- Familiarity with the Greater Washington area and the Jewish community
- The ability to attend multiple evening events including both Federation and community functions

About the Jewish Federation of Greater Washington

The Jewish Federation of Greater Washington is an innovative, mission-driven non-profit organization dedicated to building a vibrant, welcoming and inclusive Jewish community. Partnering with more than 60 local, national and international partners, Federation articulates a clear vision for Jewish life, and brings together resources of all kinds in pursuit of that vision.