



Chief Endowment and Family Philanthropy Officer Job Description

The Federation seeks an entrepreneurial fundraiser and experienced manager to lead staff and Board as they seek to engage new generations of philanthropists and their families, steward relationships with existing ones, and deliver best-in-class advisory services to Jewish philanthropists and the nonprofits they support.

The Jewish Federation of Greater Washington (Federation) 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. Federation is the leading network for Jewish progress and community building, engaging philanthropists from a significant part of Washington D.C., northern Virginia, and Maryland as a philanthropic catalyst that connects Greater Washington Jews of all ages, backgrounds, and perspectives...

“The Jewish Federation of Greater Washington strives to inspire, build, and sustain vibrant Jewish life in a changing world by mobilizing our community in common purpose, intentional innovation, and effective action. Our vision is an open, connected, and vibrant Jewish community that cares for each other, fosters Jewish learning and journeys, embraces Jewish peoplehood and Israel, and acts as a force for good in the world.

The Federation acts as a central financial resource-development and planning institution for the Jewish community, serves philanthropists, and provides planning and capacity building to local nonprofits and international NGOs. The Federation touches every aspect of Jewish communal life in the Greater Washington area in some way. The organization supports diverse causes through its annual fund and the United Jewish Endowment Fund (Endowment Fund/UJEF), which is its planned philanthropy and legacy division. The Endowment Fund manages 240 donor advised funds and over 510 legacy commitments for the future. Total assets under Endowment Fund management amount to over \$230 million.

With offices located in North Bethesda, Maryland, the Federation has a staff of 75 professionals, a 120+-member board, and also benefits from the support of many volunteers. The Federation annually raises about \$42 million which, together with other sources, provides funding for the organization’s \$7 million annual operating budget. The total raised includes \$18 million raised by the Endowment Fund for donor advised funds and other types of funds. The Endowment Fund has over \$71 million in legacy commitments for the future. Over the next five years, the Federation has a goal of substantially increasing philanthropic support, specifically by targeting the next generations of philanthropists, and by partnering with new leaders to develop innovative philanthropic initiatives that advance Jewish life and values in our world.

BASIC FUNCTION

Reporting to the CEO and working closely with volunteer leadership and senior staff, the Chief Endowment and Family Philanthropy Officer (CEFPO) will: lead efforts to achieve the overall endowment, planned giving, and multi-generational philanthropy objectives for the Jewish Federation of Greater Washington. This dynamic leader will shape the organization's overall Endowment Fund development strategy, undertake new and existing philanthropic stewardship including direct solicitations, provide research and counsel on charitable giving, and cultivate long-term relationships with key multi-generational donor families to the Federation.

The Federation's philanthropy team is structured to include both an Annual Fund and Endowment group that raise contributed revenue for the Federation's general fund, designated purposes, and the endowment, the Federation's donor advised funds and supporting foundations. In the current structure, these two groups are led by two senior advancement professionals that work closely together to realize the contributed revenue goals. The Chief Endowment and Family Philanthropy Officer is one half of this senior management leadership team and will supervise a team of four (4) professionals in the 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

The Chief Endowment and Family Philanthropy Officer will:

- Serve as lead professional in growing Federation's United Jewish Endowment Fund (UJEF) including unrestricted, field of interest and Donor Advised Funds;
- Work in close partnership with CEO, volunteer leadership, senior management team and staff to provide strategic direction to ensure the successful execution and achievement of tasks that impact the success of the organization;
- Develop comprehensive planned giving strategies; initiate endowment conversations and partner with colleagues to create planned giving opportunities within Philanthropic Leadership, The Network, Young Leadership and Community Campaign;
- Manage and direct 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;
- Oversee 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;
- Partner with President of UJEF and staff appropriate lay committees;
- Provide professional support to lay leadership to identify, initiate, and develop solicitation efforts, enhance current initiatives and implement fundraising activities;
- Develop and maintain UJEF department budget in partnership and collaboration with the executive team and COO.

IDEAL EXPERIENCE

Candidates should have the following type of experience and qualifications:

- Substantial nonprofit fundraising experience with a sizable organization that includes annual operating, endowment and capital elements; experience with donor advised funds, fiscal sponsorships, diverse philanthropic investment vehicles, and the community foundation model would be advantageous;
- A record of personal success in raising very large gifts, including some at the seven-figure and above levels from individuals, foundations and businesses; broad-based knowledge of various development activities including: proposal and grant development, planned giving, campaign management (including capital campaigns), event planning and management, and different approaches to direct solicitations;
- A familiarity with the Jewish community and an ability to work closely with a wide range of people including senior business professionals and philanthropic donors, academic and policy leaders, nonprofit and government professionals; the CEFPO must be particularly adept at collaborating with various subject matter experts and leaders of the highest caliber, and in leveraging the abilities and knowledge of such leaders for fundraising purposes;
- Personal experience with shaping fundraising systems and data that are operationally sustainable, and enable geographically dispersed constituents to coordinate their fundraising activities; experience leveraging fundraising databases and support systems for donor segmentation, research and volunteer management;
- An understanding of brand marketing and different types of outreach to various segments of philanthropists, with specific experience in structuring long-term relationships with individuals who have different priorities; demonstrated success with establishing stewardship and recognition programs;
- A track record as an exceptional communicator, written as well as oral; adept at writing proposals, solicitation letters, correspondence, and other kinds of material for publication;
- Demonstrated management skills in motivating, directing and managing staff, Board members and consultants, and in coordinating and supporting the fundraising activities of others.

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