

**Jewish Federation of Greater Washington
Chief Endowment Officer**

The Federation seeks a grounded, deeply experienced leader in Jewish philanthropic planning and advisory services, endowment management and fundraising to steward existing relationships and engage new generations of donors and their families.

The Jewish Federation of Greater Washington is dedicated to building a vibrant, welcoming and inclusive Jewish community by partnering with donors and more than 60 local, national and international organizations. As the leading network for Jewish community building, the Federation engages philanthropists from a significant part of the District of Columbia, northern Virginia, and Maryland.

With offices located in North Bethesda, Maryland, the Federation has a staff of 75 professionals, a 120+-member board, benefits from the support of many volunteers, has a \$7m annual operating budget, and annually raises about \$42 million. The total raised includes \$18 million raised by the Endowment Fund for donor advised funds and other types of funds. The Endowment Fund manages 240 donor advised funds. Total assets under Endowment Fund management amount to over \$230 million, with over 510 future legacy commitments amounting to \$71 million.

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.

The Chief Endowment Officer focuses on planned and legacy giving, endowment giving, advisory services to families, and stewardship. This person collaborates with donors to develop long term philanthropic investments and plans that fosters a vibrant Jewish community, embraces Jewish peoplehood and Israel, and acts as a force for good in the world. In undertaking this role, the Chief Endowment Officer works with board, staff, donor and grantee constituents to articulate a clear vision for Jewish life and brings together resources of all kinds in pursuit of that vision.

BASIC FUNCTION

Reporting to the CEO and working closely with volunteer leadership and senior staff, the Chief Endowment Officer 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 an Endowment group. These two groups are each led by a senior advancement professional who work closely together to realize the contributed revenue goals across all streams including unrestricted and targeted campaigns, endowment resources and donor advised funds.

Within this structure, the Endowment team acts as advisors to individuals and families on long term philanthropic investments that advance specific organizations, causes or the Federation as a whole. The responsibility encompassed by this role includes donor advised funds, donor relations and stewardship, and next generation/family philanthropy. The Chief Endowment Officer will coordinate the activities of board members, community lay-leaders and staff to meet or exceed established goals and objectives within the Endowment arena.

The Chief Endowment Officer's specific role includes to:

- 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 the 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 wealth management, philanthropic investment advisory or 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 shaping very large philanthropic investments, including some at the seven-figure and above levels from individuals, families, 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;

- An ability to work closely with a wide range of people including families, senior business professionals and philanthropic donors, academic and policy leaders, nonprofit and government professionals; the Chief Endowment Officer 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 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.

For more information please contact:

Lee Kappelman
(202)803-6674 or leek@moppenheim.com

Steven Oppenheim
(202)803-6673 or steveno@moppenheim.com

m/Oppenheim Associates
425 Market Street, Suite 1020
San Francisco, CA 94105