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NONPROFIT EXECUTIVE SEARCH FOR DEVELOPMENT & PHILANTHROPY
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Confidential Position Specification

Leadership Gifts Officer

Jewish Home

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CONFIDENTIAL POSITION SPECIFICATION

Jewish Home

Position: Leadership Gifts Officer
Reports to: Senior Development and Gift Planning Officer
Location: San Francisco, California

THE ORGANIZATION

The Jewish Home of San Francisco's mission is to enrich the quality of life for older adults. From its modest beginnings in 1871, the Jewish Home has grown and diversified to provide services for many different older adults with multiple and unique care and service needs and at various income levels. Operated by the Jewish Senior Living Group, the Jewish Home serves approximately 1,800 patients and residents each year on its nine-acre campus. Non-residential care is offered through the Home's short-term and rehabilitation services unit for patients who require geriatric-specialized, interdisciplinary rehabilitation to recover from surgery or an acute illness, and through its acute geriatric psychiatry hospital. The Home is affiliated with the University of California, San Francisco (UCSF) for teaching and research. Admission to the Jewish Home is not limited by religious or cultural affiliation.

A Comprehensive Campaign: Live. Grow. Flourish.

Over the years and with generous support from the community, the Jewish Home has enlarged and expanded its original facilities and services in response to the changing needs of elders and their families. Today, the Home is engaged in another ambitious fundraising initiative to address many of the challenges that threaten to limit life options for older adults and that often take tolls on families, caregivers, and society. The \$70M comprehensive campaign, ***Live. Grow. Flourish.*** will transform and revitalize the Home's nine-acre facility on Silver Avenue, offering a broad spectrum of affordably priced rental living options – from various levels of assisted-living to skilled nursing – and supporting a continuum of services that, ultimately, will extend beyond Silver Avenue into homes and communities around the Bay Area. The transformed campus will embrace a new model for older adult communities that allows people to comfortably age in place, whatever their initial needs and capabilities. This new model will include:

- Approximately 115 assisted/catered-living apartments
- Approximately 75 memory support assisted-living suites
- As many as 120 short-stay rehabilitation suites
- As many as 230 skilled-nursing suites
- As many as 24 acute psychiatric hospital suites
- The Square, a non-residential "marketplace of services" that includes collaboration with other service providers, and the provision of in-home services

THE POSITION

The Leadership Gifts Officer reports to the Senior Development and Gift Planning Officer (SDO) and is a key member of the fundraising team. S/he will have three primary areas of responsibility: major gifts, campaign management and social media. The Leadership Gifts Officer will be part of an Advancement team that also includes the Chief Advancement Officer (CAO), Senior Communications Officer, Web Designer, Special Events and Grants Officer, and Database and Office Manager.

Responsibilities:

Major Gifts (75%-80%)

- ❖ Identify, cultivate, solicit, and steward a portfolio of 125-150 leadership gift prospects and donors with the capacity to give at the \$10,000+ level
- ❖ Working with the SDO and CAO, design and oversee a systematic program of opportunities to engage, solicit and steward the Home's major gift prospects
- ❖ Conduct personal visits with major gift prospects and donors
- ❖ Assist the SDO in the development of a five-year development plan for major giving
- ❖ Match donor capacity and interest with appropriate appeals, projects, and initiatives
- ❖ Design and coordinate events and special cultivation opportunities to further engage current and prospective major donors
- ❖ Prepare annual update for the Jewish Home Annual Giving Wall
- ❖ Maintain complete and accurate records of donor contacts on a real-time basis in the Raiser's Edge database and actively utilize the software tracking system to monitor relationship development and ongoing communication with prospects and established donors
- ❖ Establish measurement criteria and maintain gift forecasts/proposals for prospects
- ❖ Write/edit solicitation letters, stewardship and other fundraising materials as needed
- ❖ Assist with developing the major gifts and campaign annual budgets, managing and preparing regular revenue and expense budgets for major giving
- ❖ Support other officers with cultivation and solicitation of their donors

Campaign Management (10%-15%)

- ❖ Coordinate campaign activities as they relate to major gifts, monitoring and following up with volunteer solicitors assigned to cultivate and solicit major donors
- ❖ Coordinate activities with campaign consultants, including preparing fundraising reports and overseeing preparation of agendas for Campaign Cabinet meetings
- ❖ Oversee and monitor the Home's campaign donor recognition program, including maintaining the master list of naming and dedication opportunities and ensuring that all written documentation of commitments and naming opportunities has been completed

Social Media (5%-10%)

- ❖ Oversee efforts to utilize various social media platforms to inform and solicit donors and to engage younger constituencies with the organization
- ❖ In conjunction with Advancement Office colleagues, oversee content development for social media platforms and develop processes for securing on-line gifts through social media platforms

CANDIDATE QUALIFICATIONS/EXPERIENCE

Education:

A Bachelor's degree is required. An advanced degree or equivalent is preferred.

Experience:

- ❖ Minimum of seven years of full-time, progressively responsible experience in development, including three years of proven success in major/leadership gifts
- ❖ Proven success in managing larger donor portfolios (100+ donors) and demonstrated ability to identify, cultivate, solicit and steward prospects/donors and effectively move them through the development cycle

- ❖ Experience identifying giving opportunities and thinking creatively to establish matches between donors and programs and funding priorities
- ❖ Experience in making “qualifying” calls as well as developing donor-centric cultivation and solicitation strategies
- ❖ Demonstrated ability to engage and support volunteer leadership with their efforts in fundraising, consultation, and advocacy
- ❖ Significant experience with development strategic fundraising plans and budgets
- ❖ Experience in managing effective and efficient working relationships with boards, volunteers, and senior level staff
- ❖ Significant level of computer proficiency, including MS Office and relational databases; Raiser's Edge experience preferred
- ❖ Possession of a valid California driver's license and access to an automobile
- ❖ A successful track record of meeting annual fundraising goals

COMPETENCIES/ATTRIBUTES

The successful professional will have or be:

- ❖ A high level of initiative, attention to detail and strong organization skills
- ❖ Strong verbal communication skills and the ability to write clearly and persuasively
- ❖ Strong self-motivation and ability to work as part of a collaborative team
- ❖ Skill in successfully managing multiple projects on tight deadlines and under pressure in a dynamic and open environment
- ❖ Unquestionable integrity and commitment to professional ethics, and the ability to responsibly handle sensitive and confidential information with discretion
- ❖ Ability to grasp and articulate multi-layered programs in a way that meets the interests and passions of donors
- ❖ Sensitivity to Jewish traditions and philanthropy; in-depth knowledge of Bay Area philanthropy and success in working with Bay Area Jewish philanthropic leadership a plus
- ❖ A creative team member with a clear commitment to the mission of the organization
- ❖ Passion for making a positive difference in the lives of others; operational experience working with older adults a plus
- ❖ Outgoing, warm, and enthusiastic style with a sense of humor and perspective

COMPENSATION AND BENEFITS

A competitive salary and generous employee benefits package will be offered. To be considered for this position or for additional information on the opportunity, please send resume to or contact:

David N. Randall

Principal

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