



POSITION: Senior Vice President and Managing Director, Atlanta Jewish Foundation

REPORTS TO: Chief Executive Officer

ORGANIZATION OVERVIEW

The Jewish Federation of Greater Atlanta is a philanthropic champion, connecting metro Atlanta area Jews – of all ages, backgrounds, and perspectives – to the power we have as a community to improve the world. We partner with donors, organizations, and foundations to address the pressing issues facing our community and develop innovative strategies that result in deep and lasting impact locally, in Israel, and around the world. We envision a thriving and connected 21st century Jewish Atlanta where every Jew and their loved ones can access warm Jewish community, timeless Jewish wisdom, global Jewish peoplehood and Jewish ways to do good in the world.

Federation is continuing to build a team of highly motivated and qualified individuals with a variety of skill sets to create a new model of 21st century and next generation community engagement. We are especially interested in candidates who are forward-thinking, open-minded, willing to take risks to experiment and model a positive attitude that inspires confidence and is in line with our commitment to excellence.

POSITION SUMMARY

Reporting to the President/CEO, the Senior Vice President and Managing Director will lead the Atlanta Jewish Foundation and will be responsible for its the overall growth and management. Areas of responsibility will include day-to-day oversight of the Foundation, managing Federation's planned giving efforts, and developing and maintaining the Foundation's philanthropic advisory suite of products and services. The Foundation is designed to enable multiple forms of philanthropy and donor-recommended giving through and to the Jewish and broader community.

Coming out of a year-long planning effort, Federation has an ambitious goal of revitalizing Jewish philanthropy in Atlanta and growing the Atlanta Jewish Foundation to \$1B in assets. This person will be directly responsible for planning and executing efforts to achieve this goal. The position will oversee a talented and committed team of philanthropic professionals and work closely with lay leaders to provide external assistance and guidance.

Building the Atlanta Jewish Foundation will entail developing a comprehensive business plan to create a philanthropic advisory practice and the significant growth and ongoing administration of Federation's Donor-Advised Funds, Supporting Foundations, and restricted fund programs. This role will work to position Atlanta Jewish Foundation within the competitive landscape of donor-recommended resources in metro Atlanta.

The Foundation will be technologically efficient in providing a robust, holistic and client-focused service model to philanthropists of all ages, while also providing expertise in local, national and international Jewish issues. Federation currently manages nearly 440 Donor-Advised Funds, 8 supporting foundations and over 200 restricted and custodial funds that, when combined with the unrestricted endowment fund, total \$450M, the majority of which is donor-recommended. This is an opportunity to help lead, grow and direct the work of the Federation in a meaningful way- externally and internally.

ESSENTIAL FUNCTIONS OF THE POSITION

- Work closely with the President/CEO, Chief Philanthropy Officer (CPO) and Federation lay leadership towards a vision of integrated philanthropy where campaign and endowment are centrally convened in the Jewish community at Federation.
- Oversee operations of Donor-Advised Funds, restricted and custodial funds and supporting foundations including their distinct administration, client-services, investment, fiduciary responsibilities and grant-making.
- Formalize, grow, and oversee a philanthropic advisory practice to assist members of the Atlanta Jewish community in “giving Jewishly.”
- Develop and implement a comprehensive sales and marketing strategy and plan for the Atlanta Jewish Foundation and its philanthropic advisory services, including both the ‘donor direct’ and professional advisor referral channels.
- Develop Foundation operational processes to provide exceptional customer service and high levels of added value to clients, prospective donors and referral partners.
- Design, implement and manage content, programs, collateral and business development of the Donor-Advised Fund program.
- Serve as philanthropic advisor for a select group of high capacity donors and fund holders with a goal of increasing their engagement in the work of Federation and philanthropy, in general.
- Directly manage supporting foundation and select Donor-Advised Fund relationships.
- Oversee robust tracking and information management; guide and contribute to the selection, design and implementation of a technology platform to support all aspects of Foundation operations.
- Build a cross-functional team among departments to develop a shared culture around Donor-Advised Funds, endowment, planned giving, and other Foundation offerings.
- Represent Federation at local and national events, conferences and meetings in ways that helps build relationships and trust with clients, donors and partners.
- This position requires periodic and sometimes frequent attendance/participation at events in the evening or on weekends.

QUALIFICATIONS AND COMPETENCIES:

- Executive-level experience building, managing and growing a professional services or advisory business, particularly related to financial services, and one designed around providing exceptional levels of personalized customer service.
- Previous experience working in or closely with philanthropic foundation(s).
- Wealth management/financial advisory knowledge or experience.
- Experience in a multi-faceted fundraising environment (major gifts, planned gifts, and donor-advised vehicles).
- Exceptional donor-relations skills: proven ability in creating strategies to cultivate prospects and channel donor engagement.
- Successful fundraising including direct solicitation of six- and seven-figure gifts and experience with illiquid assets.
- Strong knowledge of best practices in philanthropy trends and vehicles including Donor-Advised Funds and planned gifts.
- Outstanding verbal and written communication skills.
- Ability to work collaboratively in a goal-oriented team environment that includes both professionals and lay leaders.
- Knowledge of and appreciation for the Jewish community, its customs and practices, Federation and the Jewish nonprofit community.

Jewish Federation of Greater Atlanta is an equal opportunity employer.