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## JOB DESCRIPTION

**POSITION TITLE:** Director of Philanthropic Services

**DEPARTMENT:** Foundation

**REPORTS TO:** Chief Foundation Officer

**STATUS:** Full-time, Exempt

**PRINCIPAL FUNCTION:** As Jewish Atlanta continues to boom, the Atlanta Jewish Foundation intends to play a bold and creative role. The Foundation is part of Jewish Federation of Greater Atlanta. The Foundation manages over 1000 funds (donor-advised fund, agency funds, restricted funds, unrestricted funds) in the Atlanta community. The Foundation is looking for a creative, motivated, flexible, detail-oriented, and proactive Director of to join our efforts as we expand the ways we engage with donors in the community.

You will work with a passionate team of Foundation professionals to increase the impact of the organization's work here in Atlanta, in Israel and the world and help philanthropists give with more meaning and with ties to their Jewish values. You will collaborate with our key fundholders to provide customized philanthropic services and engagement leading to increasing the assets of the Foundation and grant impact to the community. You will help grow our fundholder base, by developing and leading strategic development and implementation of Foundation's prospecting plans. You will be responsible for a broad range of initiatives and projects to advance our efforts through collective and individual fundholder and prospective fundholder opportunities to fulfill strategic milestones for the Foundation of impact, relationships, planned gifts, and service.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

**Provide leadership in the development and implementation of engagement and stewardship programs and services for fundholders, supporting organizations and Legacy Society members to build, deepen and maintain relationships.**

- Maintains a portfolio of current and prospective fundholders. Build referrals from current fundholders. Targets and prioritizes fundholders and other constituents for engagement
- Creates an onboarding and orientation program for new fundholders.
- Responds to donor requests for information; coordinating research on nonprofit organizations in a particular field of interest and connecting fundholders to the appropriate resources within the Foundation to address their needs.
- Creates, implements, and maintains a program for providing highly customized family philanthropy and other philanthropic services including family, meeting, values exercises, multigenerational advising.
- Increases the Foundation's assets, primarily through engagement and service thereby increasing fundholder contributions and succession planning.
- Applies customer service standards to be used organization-wide to guide staff



- interactions with fundholders and prospects.
- Develops benchmarks and processes to measure success in delivering fundholder services and uses the knowledge gathered to continually enhance the Foundation's fundholder engagement program.
- Implements systems governing fund development, communications and stewardship and monitors these systems to adapt to trends and both the organization's and fundholders' changing needs.
- Works with other Federation departments to connect the Federation's programmatic expertise to fundholder interests and ensure that these resources are available to fundholders including NextGen, Teens, and other programs.
- Creates and plans experiences, events, and educational forums for fundholders and arrange site visits with nonprofits of donor interests.
- Some work is required beyond traditional work hours for meeting and events.

#### **Outreach and Awareness**

With the Chief Foundation Officer, builds and nurtures the revenue and relationship opportunity pipeline of potential fundholders, agencies and planned gift prospects:

- Works with volunteers and internal teams around individual fundholder, agency, and planned gift prospects and manage the movement of prospects through the sales cycle.
- Builds engagement opportunities for prospects and advisor partners
- Identifies, targets, and attracts new fundholders, agencies and planned gift prospects with a need and desire to address personal financial situations and / or maximize their philanthropic impact
- Helps develop tactics to expand awareness of the Foundation
- Develops a network of perpetual ambassadors for new business and Foundation growth

#### **Leads the implementation of the Foundation's customer relationship management and stewardship approach.**

- Tracks and monitors relationships with donors, builds profiles of donors, advisors, prospects, planned gift donors, and researches fundholders' interests, giving patterns and philanthropic capabilities through use of Stellar, the Foundation's back-office system, with the end-goal of maintaining a tool for fundholder services, nonprofit relationship building, and moves management.
- Creates, implements, and maintains a program for capturing fundholder interests to customize outreach and engagement and provide more appropriate service.
- Develops and implements metrics assessing Philanthropic Services' effectiveness.

#### **Manages a team to oversee the creation, maintenance, growth, and efforts of a Legacy Society.**



- Creates, implements, and builds a society for those who have participated in legacy programs and those who have left legacy intentions.
- Is knowledgeable about planned giving vehicles to provide customized legacy planning.
- Grows Jewish Future Pledge and LIFE & LEGACY commitments.
- Works with volunteers and the philanthropy teams around individual fundholder and planned gift prospects and manage the movement of prospects through the sales cycle.

**With the Marketing Department, creates, updates, and maintains collateral such as fundholder handbook, fundholder reports, fundholder statements, newsletters, emails, website and product and service information sheets.**

**Represents the Foundation at various events and community gatherings.**

**Other duties as assigned.**

**QUALIFICATIONS:**

- Bachelor's degree required, Master's or advanced degree preferred, and eight-ten years of experience in charitable giving, philanthropic planning and advising, planned giving, customer service, grantmaking, project management, client services, and/or sales development.
- JD, CPA, CAP or similar degree preferred.
- Demonstrated understanding and commitment to the Jewish or Atlanta community, strong interpersonal, leadership and organizational skills.
- Knowledge of computer and database utilization required. Experience in volunteer management and fundraising or sales strongly preferred.
- Must have own transportation, valid State of Georgia driver's license and proof of automobile insurance for traveling to outside meetings and events as well as occasional transporting of materials.

**PHYSICAL REQUIREMENTS:** Minimal physical effort required with intermittent standing and walking and prolonged periods of sitting in meetings or at desk working with computer. Must be able to regularly attend events and meet people in-person. Position requires stamina to work extended days to include early morning, evening and weekend events and meetings in addition to the regular work schedule.

**Please submit cover letter and resume to [jmendel@jewishatlanta.org](mailto:jmendel@jewishatlanta.org). Please put POSITION: Director of Philanthropic Services in subject line.**

\*Jewish Federation of Greater Atlanta/Atlanta Jewish Foundation is an equal opportunity employer.