JOB DESCRIPTION

POSITION TITLE: Director of Philanthropic Services
DEPARTMENT: Foundation
REPORTS TO: Chief Foundation Officer, Managing Director
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 The Jewish Federation of Greater Atlanta. The Foundation manages over 700 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 Philanthropic Services 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 be responsible for a broad range of initiatives and projects to advance our efforts through collective and individual fundholder opportunities to fulfill strategic milestones for the Foundation of impact, relationships, planned gifts, and service.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

MAJOR 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.

- Creates, implements, and maintains a program for providing highly customized family philanthropy and other philanthropic services including family, meeting, values exercises, multigenerational advising.

- Maintains a portfolio of current and prospective fundholders. Build referrals from current fundholders.

- Creates an onboarding and orientation program for new fundholders.

- Increases the Foundation’s assets, primarily through engagement and service thereby increasing fundholder contributions and succession planning.

- Responds to donor requests for information; coordinating research on nonprofit organizations in a particular field of interest, and also connecting fundholders to the appropriate resources within the Foundation to address their needs.

- 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.

• Targets and prioritizes fundholders and other constituents for engagement using prospect research tools; supports the scheduling of and outreach to targeted fundholders for Chief Foundation Officer, President/CEO and other management staff.

• 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.

**Leads the implementation of the Foundation’s customer relationship management approach.**

• Tracks and monitors relationships with donors, builds profiles of 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 in order to customize outreach and engagement and provide more appropriate service.

• Develops and implements metrics assessing Philanthropic Services’ effectiveness.

**Leads the creation, maintenance, growth and efforts of a Legacy Society.**

• Creates, implements, and maintains a program for those who have participated in legacy programs and those who have left legacy intentions.

• Be knowledgeable about planned giving vehicles to provide customized legacy planning.

**Works with volunteers and internal 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, fundholder portal, newsletters, website and 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. 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 employment@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.