

Senior Philanthropic Services Officer

Toledo Community Foundation

JOB TITLE: Senior Philanthropic Services Officer

DEPARTMENT: Philanthropic Services

SUPERVISOR: VP, Philanthropic Services & Advancement

Toledo Community Foundation, Inc. is a community asset. The Foundation is a collection of funds established by donors interested in philanthropy and supporting the Toledo area. Currently, the assets of the Foundation are approximately \$300 million, made up of over 860 funds. The Foundation is the largest grant maker in the Toledo area, granting \$17 million a year.

GENERAL JOB DESCRIPTION

The Senior Philanthropic Services Officer is charged with meeting goals and contributing to the overall growth of the Foundation; to secure funds for the organization by fulfilling the interests and passions of fundholders and potential fundholders to the Foundation by providing them with giving opportunities and encouraging them to give. This position will be responsible for providing assistance to the VP, Philanthropic Services & Advancement related to development and donor services. This position is responsible for: increasing and enhancing the Foundation's development and donor services as it relates to high net worth donors and large corporate funders; identifying potential donors and professional advisors for the purpose of attracting new funds to the Foundation; working with prospective donors to establish funds. The person in this position will implement programs, activities and services designed to develop and maintain good relationships with potential and current donors, affiliated community foundations and professional advisors. This position will also need to cultivate and solicit planned gifts, develop and implement thoughtful, strategic cultivation, solicitation and stewardship plans for prospective donors. Ensure regular contact with donors through various activities and communications, especially face-to-face meetings. Develop expertise in cultivation and stewardship.

MAJOR DUTIES AND RESPONSIBILITIES

Identify, cultivate, solicit and close prospective donors, including individuals, families, businesses and private foundations, especially those in the high net worth bracket

Devotes a majority of an annual work year's hours to face-to-face contacts with identified, qualified potential and existing donors/fundholders and provide documentation of such activities

Coordinate suggestions for planned giving vehicles with prospects and their advisors in order to meet their estate, financial and charitable planning goals

Build and maintain relationships with estate and financial planner professionals

Maintain a high level of expertise regarding state and federal taxes, gift and estate giving methods and the legal aspects of charitable giving

Maintains professional competency by pursuing industry knowledge, keeping apprised of current and national donor trends, and building awareness of latest technologies and best practices to promote performance

Assist with mentoring team members and colleagues

Work with the Foundation's prospective donors to draft fund governing documents or other fund agreements

Develop and maintain prospect and donor portfolios from identification of prospect names to the actual solicitation of the gift

Maintain a portfolio of qualified prospective donors

Assist the department in raising, on average, \$20 million per year, as well as planned gifts

Establish a program of personal visits with past, present and future (Legacy) donors

MINOR DUTIES AND RESPONSIBILITIES

Assist in the management of the department's services provided to the affiliated community foundations

Work cooperatively with other staff to assist, as needed, with his or her responsibilities, and to ensure a smooth and timely flow of support services within the Foundation

Other duties as assigned

QUALIFICATIONS FOR THE JOB

Education:

Bachelor's degree

Experience:

Minimum 6 years professional fundraising experience including cultivating, soliciting and closing prospective donors with record of 6-figure major gift history and successful planned gift experience

Comprehensive knowledge and understanding of state and federal taxes and gift and estate giving methods in regards to charitable giving

Knowledge of community foundations preferred, but not required

Understanding of and commitment to the Foundation's goals and mission

Other:

Outstanding written and verbal skills

Must be able to develop interpersonal relationships with multiple constituents

Ability to plan, organize and remain accountable

Experience in making group presentations and committee management

Ability to function in a confidential manner

KEY COMPETENCIES

Impeccable ethics, initiative, enthusiasm and ability to establish credibility

Able to organize own work in the Philanthropic Services Department to meet deadlines

Able to think and act independently and with good judgement

Advanced word processing skills

PHYSICAL REQUIREMENTS

While this is mainly an office position, the ability to lift small boxes (letter stock, postcard stock, paper) is required occasionally

Additionally, this position will require travel outside of the office to meet with prospective donors, financial planners, current donors and professional development opportunities

Signature Approved By:

Date Approved:

Date Last Reviewed:

Last Reviewed By:
