



TITLE: Vice President, Philanthropic Services and Advancement

SUPERVISOR: Chief Operations Officer

Greater Toledo Community Foundation 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 \$330 million, made up of over 900 funds. The Foundation is the largest grant maker in the Toledo area, granting \$15 million per year.

GENERAL JOB DESCRIPTION

Provides assistance to the President in matters related to development and donor services, including:

- Managing and overseeing the Foundation's Philanthropic Services department;
- Providing primary responsibility for increasing and enhancing the Foundation's development and donor services;
- Identifying potential donors and professional advisors for the purpose of attracting new funds to the Foundation;
- Working with prospective donors to establish funds;
- Planning/implementing programs, activities and services designed to develop and maintain good relationships with potential and current donors, affiliated community foundations and professional advisors.

PRINCIPAL RESPONSIBILITIES

Supervises the work of the Philanthropic Services staff in the areas related to development and donor services which includes but is not limited to:

- Identify, cultivate, solicit and close prospective donors, including individuals, families, businesses and private foundations for the purpose of attracting new funds to the Foundation, including:
 - Coordinate suggestions for planned giving vehicles with prospects and their advisors in order to meet their estate, financial and charitable planning goals;
 - Execute presentation meetings at intermediary firms;

- Build and maintain relationships with estate and financial planning professionals (attorneys, accountants, trust officers, financial planners, brokers, insurance agents and other advisors);
 - Maintain a high level of expertise regarding state and federal taxes, gift and estate giving methods and the legal aspects of charitable giving;
 - Develop, manage and administer the wills and bequests program;
 - Work with the Foundation's prospective donors to draft Fund Governing Documents or other fund agreements;
 - Develop and maintain prospect and donor portfolio from identification of prospect names to the actual solicitation of the gift.
- Maintain a portfolio of at least 75 qualified prospective donors and manage Philanthropic Services staff to maintain their portfolio of qualified prospective donors and fundholders.
 - Have responsibility for the department in raising, on average, \$10 million per year and an additional \$10 million in planned gifts.
 - Work with President and Development Committee to develop long-term funding opportunities that support the strategic plan.
 - Coordinate professional advisor program.
 - Manage the department's move management process; i.e., moving donors through the various stages of giving, including prospective donors to fundholders to planned gifts.
 - Manage the department's services provided to the affiliated community foundations.
 - Provide staff support to the President, COO, Board and Development Committee regarding the Foundation's development activities.
 - 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.
 - Establish a program of personal visits with past, present and future (Legacy) donors, including:
 - Design and present gift planning ideas for current and future funds;
 - Create and manage active donors through various stages of giving.
 - Other duties as assigned.

QUALIFICATIONS

- Bachelor's degree required.
- Minimum 5 years professional fundraising experience including cultivating, soliciting and closing prospective donors with record of 6-figure major gift history and successful planned gifts 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.
- Outstanding written and verbal skills. Must be able to develop interpersonal relationships with multiple constituents.

- Ability to plan, organize, manage and remain accountable.
- Experience in making group presentations and committee management.
- Ability to function in a confidential manner.
- Impeccable ethics, initiative, enthusiasm and ability to establish credibility.
- Able to organize own work and the Philanthropic Services department work to meet deadlines.
- Able to think and act independently and with good judgment.
- Advanced word processing functions and database experience.

PHYSICAL REQUIREMENTS

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

There will be some in-town travel required and occasional out-of-town travel for professional development opportunities.

To apply for this position, email your resume and cover letter to Toledocf@toledocf.org. Please include Vice President of Philanthropic Services and Advancement in the subject line.