



Foundation Legacy and Endowment Giving Officer

POSITION SUMMARY

The Jewish Federation & Foundation of Greater Toledo ("JFGT") is seeking an engaging, dynamic, and motivated professional to join our team as a Foundation Legacy and Endowment Giving Officer to be part of its Endowment team. The Foundation Legacy and Endowment Giving Officer ("FLEGO") is a full-time, exempt employee of Jewish Federation of Greater Toledo ("JFGT"). JFGT maintains and operates the Toledo Jewish Community Foundation ("TJCF"). The FLEGO in coordination with the JFGT Chief Executive Officer, the Foundation Operations Officer and the Donor Development Officer will support JFGT and TJCF to enhance and strengthen the Jewish community through total financial resource development ("FRD").

The FLEGO will work in the key areas of donor identification, development, stewardship, professional outreach, and donor recognition event planning.

BACKGROUND

With an annual operating budget of over \$4 million dollars and a staff of approximately 30 full-time team members, JFGT is the central address for community programming, services and philanthropy for the Jewish community of northwest Ohio and part of southeast Michigan. JFGT includes a successful endowment program through the Toledo Jewish Community Foundation ("TJCF"), a seven-figure annual campaign, a Jewish Senior, Family and Social Services division including a community food pantry, a professionally staffed Jewish Community Relations Council, a preschool in its own building, the PJ Library program, an active Next Jewish Generation program, Hillel programs at two state universities, exceptional programs for community members age 60 and better and a Toledo Jewish Community Cemetery Association that operates and maintains two cemeteries.

TJCF has been cultivated within the Toledo Jewish community for over 25 years and is responsible for an investment portfolio of approximately \$50 million dollars. TJCF coordinates contributions and distributions for 58 donor advised funds and approximately 120 other restricted, board-restricted, designated, agency and unrestricted funds. TJCF provides management supervision for four supporting organizations with over \$18 million dollars in assets as well as dozens of restricted and designated funds including Lion of Judah Endowments and Perpetual Annual Campaign Endowments.

The Toledo Jewish community is small but continues to support three synagogues as well as Chabad. Toledo boasts the University of Toledo, the Toledo Mudhens, the nationally recognized Toledo Zoo and the Toledo Museum of Art. Toledo is at the cross-roads of America with easy north/south highway access on I-75 and east/west highway access on I-80. It is within 50 minutes driving to Ann Arbor, 55 minutes to Detroit, 2.5 hours to Cleveland, and 4 hours to Chicago.

QUALIFICATIONS

- Bachelor's degree preferred; law degree or other advanced degree in finance, tax or accounting beneficial.
- 3-5 years' experience in non profit operations or management, fundraising and planned gift development preferred.
- Knowledge of fundraising database systems and the use of technology in prospect identification and research.
- Effective at forging strong interpersonal alliances at all levels both within and outside the organization.
- Excellent written and verbal communication skills.
- Knowledge and understanding of Jewish customs, traditions, the Jewish community, and the Federation field.

MAJOR RESPONSIBILITIES

- Identify, cultivate and maintain relationships with potential and current TJCF donors and fund holders and successfully propose, secure, document and acknowledge planned legacy gifts.
- Process and oversee the grant cycles with donors for the TJCF Long Term Community Needs Fund, designated and restricted funds and Supporting Organizations, including publishing and promoting requests for proposals, application intake, review, decisions, meeting coordination, grant distribution and post-grant evaluation.
- Explore the viability of a community Life and Legacy campaign and, if viable, organize and execute a community campaign aimed at securing planned gifts to TJCF for the benefit of JFGT and other Toledo Jewish communal institutions.
- Identify and cultivate relationships with local professional advisors including financial planners, insurance professionals and attorneys who provide professional services to potential and current JFGT and TJCF donors to educate and inform regarding the JFGT mission and to encourage financial resource development for JFGT and TJCF.
- Analyze existing restricted and designated funds (other than DAFs) and understand options for securing distributions, merging or terminating funds.
- Maintain current working knowledge of estate, gift and tax laws as they relate to charitable giving and various ways to make charitable gifts.
- Coordinate, staff, prepare agendas, meeting minutes and post-meeting follow up for TJCF board meetings and the following TJCF standing committees: (1) Advisory Committee on Grants; and (2) Development.
- Work with JFGT and TJCF outside counsel.
- Coordinate and perform efforts with the Foundation Operations Officer in connection with marketing, public relations and events to educate and engage the community in distribution and endowment opportunities.
- Staff the Jewish Senior Services Supporting Organization Board and other supporting organizations, as assigned.

- Promote requests for grant proposals, assist donors with grant opportunities and communicate with grantor's regarding the evaluation of completed grants.
- Coordinate and execute planned giving marketing efforts in conjunction with the Vice President—Marketing, Communications and Strategy. This involves writing of articles for the Toledo Jewish News, preparation of an Annual Report, development of TJCF presentation materials for donors and professional advisors as well as others and other pertinent communication pieces.
- Create, plan, implement and staff events and/or special projects in support of fundraising priorities, donor engagement and recognition.
- Coordinate efforts with the Foundation Operations Officer and the Donor Development Officer as part of the FRD division of JFGT including appropriate budgeting.
- Represent JFGT and TJCF at community functions and be a visible presence at events in the Jewish and non-Jewish community, as appropriate and requested.
- Develop metrics and benchmarks to measure success in meeting JFGT and TJCF philanthropic goals and provide regular progress reports.

TO APPLY

Applicants must include a cover letter stating interest in the position, a list of three (3) recent professional references who only will be contacted in case of a candidate being interviewed, and a resume of educational and professional experience. Application should be sent via email to tina@jewishtoledo.org.

Salary range: \$60,000 to \$75,000.