

Position Title: Director of Foundation Operations

Reports to: Vice President for the Jewish Community Foundation

Position Summary:

The Jewish Federation of Palm Beach County is the center for Jewish Philanthropy in the Palm Beaches. With total annual philanthropy results of close to \$30 million in Fiscal Year 2019, Federation supports and enriches the lives of people in Jewish households locally, nationally, in Israel, and around the world. Our future is bright with one of the largest Jewish communities in North America and with approximately \$100MM under management and 400 legacy donors in the Jewish Community Foundation from bequest intentions, endowments, trusts, supporting foundations, donor advised funds, and charitable gift annuities.

The Director of Foundation Operations is responsible for managing key operations functions for the Jewish Community Foundation (JCF) of the Jewish Federation of Palm Beach County. In coordination with the Vice President, the Director will be the initial contact person for the enforcement of key JCF policies. This role will ensure compliance with all applicable policies and laws pertaining to planned gifts. The Director is also responsible for the preparation and monitoring of the department budget, and for project managing and reviewing reporting for the JCF.

The Director of Foundation Operations will have duties that include, but are not limited to the following:

Program Management

- Serve as the local coordinator of the LIFE & LEGACY™ program, a 4-year partnership program of the Harold Grinspoon Foundation that promotes legacy giving to benefit Federation, partner agencies, Synagogues and other Jewish organizations. Federation is now in its 3rd year. Through trainings, support, marketing and monetary incentives, the Director motivates local Jewish organizations to secure legacy gifts, steward donors and integrate legacy giving into the philanthropic culture of the Jewish community.
- Provide oversight for other Foundation programs, including but not limited to Donor Advised Funds and Supporting Foundations.

Estate and Trust Administration

- Manage settlement and realization of estate gifts to Federation.
- Interacts with outside attorneys, executors, and trust administrators who are responsible for transferring assets to the Federation.
- Implement processes to achieve goals of receiving full value of bequests in a timely manner;
- In coordination with the Vice President, manage gifts of real estate, complex assets, and tangible personal property.

- Oversee the authorization process of legal documents pertaining to bequest distributions including wills, trusts, beneficiary designations, fiduciary accounts, and receipt and release agreements.
- Oversee the internal reporting process that informs appropriate parties of pending estate matters and incoming revenue.

Gift Administration and Management

- Management of Gift Administration
 - Manage processes related to the creation of new endowment documentation, multi-year current use fund agreements, and amendments of previously established funds. Prepare and/or review endowment, gift, and naming agreements in coordination with Development Officer, ensuring documented purpose and terms adhere to established policies.
 - Act as the primary contact for inquiries about Federation policies regarding the establishment of new gift agreements, including researching endowment/gift policy and compliance issues, and investment related questions.
 - Use Federation's database to track and manage gifts agreements; perform ad hoc queries and audits of information as needed.
 - Manage electronic files in coordination with an administrative assistant.
- Planned Giving Administration
 - Responsible for overseeing the life income program.
 - Supervise the JCF Administrator who has responsibilities for the day-to-day operations of the Donor Advised Fund (DAF) program. Ensure quality control procedures are followed for grant distributions from DAFs, including personally approving grants of \$10,000 and more.
 - Review all new planned gifts to ensure appropriate documentation is complete and is in compliance with existing policies.
 - Ensure proper processing of planned gifts, including coordinating with other Federation departments to properly allocate funds.
 - Monitor and ensure proper tracking of planned gifts for campaign and reporting purposes.
 - Oversee acknowledgement process for planned gifts with Donor Relations, ensuring accurate and timely acknowledgement.
 - Manage planned gifts in holding, ensuring compliance with Federation processes.
- In-Kind Gifts and Real Estate
 - Assist with due diligence for proposed gifts of art, tangible personal property, and real estate; and, where appropriate, acceptance and processing of the gifts.
 - Manage process for booking gifts with Donor Information Services, ensuring accurate crediting and acknowledgment of the gift.
 - Coordinate IRS Form 8283 and secure appropriate internal signatures in a timely manner.

JCF Marketing and Events

- Guide and direct the design and implementation of the JCF marketing plan in coordination with external vendor and Federation's Marketing and Strategic Initiatives group.
- Supervise the Administrative Assistant, who has responsibilities for the day-to-day execution of JCF marketing initiatives.
- Coordinate and manage the production of planned giving marketing materials and solicitations which complement the JCF website and electronic resources.
- Report on efficiency and response of marketing materials, including website analytics, to suggest and determine useful audience segmentation and/or strategy changes for the future.
- Organize and manage events for JCF donors and prospects in coordination with Federation's Event Services team.

Policies and Compliance

- Serve as the initial point of contact for key policies related to planned gifts including the Gift Acceptance Policy and Campaign Counting Policy.

Office Administration and Personnel Management

- Budget
 - Initial preparation of the annual budgeting process, ensuring that detailed annual budgets are completed and submitted in a timely manner.
 - Oversee day-to-day operations for the budget, working with the department administrative professional to include reconciliations, employee reimbursements, and invoice payments.
 - Oversee and monitor actual expenditure levels against budget projections and funding obligations.
 - Coordinate the preparation and interpretation of financial reports for Vice President's review.
- Reporting
 - In coordination with Director of the Data Center, develop financial reporting for campaign forecasting, analyses and to reflect the gift totals and other goals for the Foundation.

Additional

- Undertake fundraising-related projects, such as the coordination of ad hoc committees and evaluative projects. Take responsibility for writing memos, briefings, and stewardship reporting as needed.
- Other duties as assigned.

Qualifications

- Bachelor's degree required; advanced degree preferred.
- A minimum of 5 years of related work experience, preferably in planned giving, sales, legal, finance or other similar setting required.
- Ability to design, implement, and direct multiple projects, setting deadlines and ensuring program accountability.
- Ability to make strategic decisions based on analysis, wisdom, experience, and judgment.
- Maintains confidentiality of frequently sensitive and emotionally charged information.

- Superb communications skills; ability to communicate effectively.
- Strong interpersonal skills, ability to work collaboratively as a member of a team.
- Work well under pressure in fast-paced, rapidly changing environment. Interest in the Jewish community and commitment to the goals of the Jewish Federation of Palm Beach County.

ADDITIONAL REQUIREMENTS:

- Ability to read and comprehend detailed documents and instruments and to perform detailed work using reasoning and problem-solving skills.
- Strong oral and written communications and organizational abilities.
- Must be able to deal with confidential data.
- Strong interpersonal skills.
- Capacity to keep up with current trends and training in this field.

The Jewish Federation of Palm Beach County is an Equal Opportunity Employer.