



Position: Vice President, Jewish Community Foundation
Reports to: Chief Development Officer (CDO)
FLSA Classification: Exempt
Department: FRD

Organization Summary:

Jewish Federation of Palm Beach County is a 501(c)3 nonprofit organization dedicated to transforming, inspiring and saving lives in the Palm Beaches and 70 countries around the world. Each year, Jewish Federation inspires thousands of community members to contribute, volunteer and participate in programs that generate nearly \$30 million to leading a powerful impact in the community.

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 \$40 million in Fiscal Year 2021, the Federation supports and enriches the lives of people in Jewish households locally, nationally, in Israel, and around the world. Jewish Palm Beach is one of the largest Jewish communities in North America. It has approximately \$140MM under management and 400 legacy donors.

Reporting to the Chief Development Officer (CDO), the Vice President (VP) for the Jewish Community Foundation (JCF) is the principal leader for the Federation's planned giving and endowments team, the Jewish Community Foundation. The VP will collaborate with the JCF Board of Trustees and the Federation Management Team to provide strategy and oversight to grow Foundation assets to sustain the Jewish community.

Essential Duties and Responsibilities:

- Responsible, in consultation with the CDO and the Federation President & CEO for the Federation's overall Planned Giving and Endowments strategy. Develops annual and multi-year work plans that leverage the Federation's expertise to maximize earned philanthropic support for the Federation and our partners. Engages in strategic collaboration between the JCF team and other Federation functions, especially colleagues in Development, External Affairs, and Finance, to maximize philanthropic support through gift planning vehicles and Donor Advised Funds.
- Leads a team of JCF professionals who work individually and collaborate with other Development Officers to raise philanthropic resources for the Federation. The team researches appropriate planned giving vehicles for prospective donors, develops gift illustrations and proposals, contributes to prospect strategy development, and frequently meets with donors and their advisors alone or in collaboration with other development officers to assist in developing planned giving opportunities the closure of gifts.
- Staff the activities of the JCF Board of Trustees, the JCF Chair, and related convenings of lay leaders, such as the Gift Acceptance Committee. This work includes serving as an informed resource person to the Chair and members of the Board, providing a thorough orientation for each new chair/member, consulting with the Chair to develop agendas and conduct effective meetings, execute Board meetings with substantive discussion, carry forth the work of the Board between meetings, facilitate communication of Board activities, make regular contact with the Board Chair and Trustees.
- Serve as an active member of the Federation Management Team and the FRD Senior Team. Their members collectively lead the Federation's integrated and comprehensive fundraising program with lay leaders.



- Develop and execute strategies to increase familiarity and fluency with gift planning vehicles among our staff and donor community.
- Personally manages a portfolio of planned gift prospects at various stages of their relationship with the Federation. This work includes prospect strategy development, cultivation, solicitation, and stewardship. Strategy is frequently set in conjunction with other development officers. Leads the development and execution of strategy with these prospects and ensures that relevant Federation colleagues are involved and informed where appropriate or advisable.
- Collaborates with colleagues in Development and External Affairs to identify planned giving prospects. Works closely with External Affairs to develop gift planning marketing and stewardship plans, as well as gift planning collateral materials.
- Oversees a comprehensive bequest and testamentary gift program (the Legacy Society). Partners with staff and lay leadership to promote the Jewish Palm Beach community's legacy giving/bequest intentions.
- Collaborates with colleagues in Finance and external legal counsel to maintain and update administrative procedures for planned gifts; and ensure accurate processing and administration of charitable trust and life income gift assets, documentation, disclosure requirements, and associated contemporaneous acknowledgment and crediting. Assists in creating gift acceptance guidelines and crediting policies. Stays informed legislative, and tax changes affecting planned giving and keeps staff informed of relevant changes.
- Remains up to date on current issues relating to the gift planning profession through local planned giving associations, professional journals, seminars, conferences, and workshops. Maintains a professional external presence in the planned giving community and allied professionals.
- The above covers the most significant responsibilities of the position. However, it does not exclude other duties, the inclusion of which would conform with the level of the role.

Other

- In collaboration with FRD leadership, works periodically on special projects to advance overall fundraising objectives.
- Serve as a Federation representative with partners and agencies and with the philanthropic community of the Palm Beaches.
- Other duties as assigned.

Qualifications and Success Factors:

- A Bachelor's Degree and at least ten years of gift planning or fundraising experience, or comparable work experience gained within the sales, legal or financial professions.
- Excellent verbal and written communication skills.
- Travel and some overnight and weekend work are required. Must maintain valid Florida driver's license.
- Committed to the mission of the Jewish Federation of Palm Beach County and an organizational culture of collaboration and respect. Possess a supportive and accessible leadership style that inspires individuals to hold themselves to the highest expectations.
- Gives consistent, timely feedback and positive reinforcement to foster a culture of learning and development.
- Has the ability to lead and motivate direct reports and lead with influence across different departments.
- Demonstrated success in employing gift planning and tax strategies with high-net-worth individuals and their advisors.



- Is agile, adaptable, and comfortable with ambiguity. Models a positive and calm response to challenges and change. Is committed to continuous improvement and growth, personally and for their team.
- A natural relationship builder who is solution-focused and exhibits exceptional active listening skills.
- A sophisticated understanding of planned giving outreach, solicitation, and stewardship approaches is preferred.
- Ability to respectfully and adeptly communicate, interact, and facilitate conversations with high-level prospects, donors, and leaders.
- Is committed to fostering a diverse and inclusive workplace.
- Possess the ability to think strategically and creatively. Demonstrates excellent critical thinking and analysis skills.
- Demonstrated ability to think strategically, develop new ideas and programs, and gain stakeholder buy-in, which results in the successful execution of new plans and programs.
- Strong knowledge of basic office computing, including MS Office (Outlook, Word, Excel, PowerPoint, Teams), Zoom and basic database skills required including familiarity with pivot tables and formulas in Excel.
- In depth proficiency using management level functions of a donor database or similar CRM system.
- Model a personal commitment to the Jewish community and Jewish values; ability to ground relationships with donors and prospective donors in Jewish culture and values and the ability to demonstrate, communicate and represent those values to others.

Work Environment:

Position is eligible to work from home in accordance with Federation policies. When working from home, employee must:

- Follow all Federation policies and procedures,
- Be available to other employees during Federation's normal business hours,
- Not work from a public place (e.g. coffee shop, library, etc.) and/or join a public, unsecure wi-fi network when working with sensitive or confidential information,
- Coordinate with IT department to maintain appropriate computer equipment and connectivity.

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

The duties and responsibilities described are not a comprehensive list and additional tasks may be assigned to the employee from time to time at the Federation's discretion. Employment is at-will, and this job description is not an employment contract and nothing herein shall be deemed to create in any way whatsoever an employment contract.

To apply online, please visit our career's page. Or email your resume and cover letter to: HRrsvp@jewishpalmbeach.org.

NO CALLS, PLEASE