Position: Operations Director, Meyer Jewish Community Foundation
Reports to: Vice President, Meyer Jewish Community Foundation
FLSA Classification: Exempt
Department: Financial Resource Development (FRD) / Meyer Jewish Community Foundation (Meyer JCF)
Full/Part Time: Full-time

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, the Jewish Federation inspires thousands of community members to contribute, volunteer, and participate in programs that generate $50 million, thereby creating a significant impact within the community.

The William A. Meyer Jewish Community Foundation (Meyer JCF) operates as a department of Federation’s integrated Financial Resource Development (FRD) team. It strengthens Federation’s role as the local community’s center for philanthropy and leads our Philanthropic Advisory Practice, including Donor Advised Funds, and endowment fundraising for Federation, local synagogues, and community agencies.

Position Summary:
The Operations Director is responsible for supporting the operations of the William A. Meyer Jewish Community Foundation, including gift planning and related tax and legal matters, leading our Philanthropic Advisory Practice, managing assigned Meyer JCF staff and overseeing the execution of their day-to-day work, and serving as the principal liaison with the Finance Department members assigned to Foundation matters. In coordination with the Vice President, the Operations Director will be the initial contact person for the enforcement of key planned giving policies, including those pertaining to donor advised funds (DAF), the LIFE and LEGACY® program, endowments, life income gifts, gift acceptance, campaign counting, and applicable donor disclosures. The Operations Director has responsibility for administrative functions pertaining to planned gifts, internally and externally managed annuities and trusts, estate and trust distributions, IRA gifts, outright gifts of securities, non-cash gifts including real estate, art, tangible personal property, life insurance, and complex asset gifts. The Operations Direction will ensure compliance with all applicable policies and laws pertaining to planned gifts and is also responsible for the administration and monitoring of the department budget, and for project managing and reviewing reporting for the Meyer JCF.

The successful candidate will lead a team that collaborates extensively with colleagues across Federation, including in Financial Resource Development (Annual Campaign, Development Services, Marketing, Events, and more) and other key offices throughout Federation, including Finance. This position reports to the Vice President, Meyer Jewish Community Foundation.

Essential Duties and Responsibilities:
Philanthropic Advisory Practice Program Management
• Provides oversight of traditional Philanthropic Advisory Services, including Donor Advised Funds (DAF) and Supporting Foundations, and new initiatives underway including Priority Funds and the management of private foundations. Through our Philanthropic Advisory Practice, we will be more visible and relevant to an emerging generation of Jewish philanthropists and be able to steep them in Jewish values as a prime motivator in giving and a prime creator of meaning in their Jewish lives. Also, we aim to increase donor-directed grantmaking, thereby impacting the community.
• Supervises the Grants Administrator who has responsibilities for the day-to-day operations of the DAF program. Ensures quality control procedures are followed for grant distributions from DAFs, including personally approving grants of $10,000 and more.

• Serves as the project manager for the Priority Fund. Activities include coordinating with the Community Strategy & Planning Department to identify greatest funding needs, draft and present proposals to donors and development team; tracks and monitors allocations of donor directed gifts.

• Collaborates with the Marketing Department to develop written proposals and key communications pieces for select people engaged in Meyer JCF philanthropic services.

Estate and Trust Administration

• Responsible for the settlement and realization of estate gifts to Federation in partnership with Finance staff members assigned to Meyer JCF tasks, including gifts by will or trust, stocks and other securities, retirement funds, payable on death accounts, life insurance, etc.

• Interacts with outside attorneys, executors, and trust administrators who are responsible for transferring assets to Federation.

• Reviews and improves processes, where appropriate, to achieve goals of receiving full value of bequests in a timely manner; following donor intent regarding use of gifts; managing the process and workload efficiently; and provides timely and accurate information to Finance staff members assigned to Meyer JCF tasks.

• In coordination with the VP, Meyer JCF and other key stakeholders, manages gifts of real estate, complex assets, and tangible personal property.

• Coordinates the activities of occasional outside counsel regarding Meyer JCF activities.

• Oversees the authorization process from Finance of all legal documents pertaining to bequest distributions including wills, trusts, beneficiary designations, fiduciary accounts, and receipt and release agreements.

• Oversees the internal reporting process that informs appropriate parties of pending estate matters and incoming revenue.

• Collaborates with Development Services, VP, Meyer JCF and other parties within Meyer JCF to ensure appropriate stewardship is provided for planned gifts.

Gift Administration and Management

• Oversees and plays a lead role in the creation of new endowment documentation, multi-year current use fund agreements, and amendments of previously established funds. Prepares and/or reviews endowment, gift, and naming agreements in coordination with donor officers ensuring documented purpose and terms adhere to established policies.

• Acts as the primary contact for both internal and external inquiries about Federation policies regarding the establishment of new gift agreements, including researching endowment/gift policy and compliance issues, and investment related questions.

• Uses Federation’s CRM database to track and manage gifts agreements; performs ad hoc queries and audits of information as needed.

• Analyzes, reviews and improves processes, policies and procedures where appropriate to increase efficiencies, provide high-quality internal and external customer service and protect the interests of Federation.

• Serves as a point of contact for exceptions to general policies and guidelines and extremely complex or gifts that otherwise need additional attention by the VP, Meyer JCF.

• Manages electronic files in coordination with support staff.

• Serves as the initial point of contact for key policies related to planned gifts including the Gift Acceptance Policy and Campaign Counting Policy.
Planned Giving Administration

- Responsible for overseeing the life income program. Serves as main contact for Finance staff assigned to Meyer JCF tasks concerning investment and administration of the planned gift assets.
- Reviews all new planned gifts to ensure appropriate documentation for counting and crediting, and compliance with existing policies.
- Coordinates with Finance staff assigned to Meyer JCF tasks to ensure proper processing of planned gifts, including coordinating with other Federation departments to properly allocate funds.
- Monitors and ensures proper tracking of planned gifts for campaign and reporting purposes.
- Oversees acknowledgement process for planned gifts with Development Services, ensuring accurate and timely acknowledgement.
- Manages planned gifts in holding, ensuring compliance with Federation processes.
- Lead staff for In-Kind Gifts and Real Estate.

Additional

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

Qualifications and Success Factors:

- Bachelor's degree required; advanced degree (J.D., LLB, related advanced degree/certification) preferred.
- Five or more years of related work experience, preferably in planned giving, legal, finance or other similar setting or equivalent combination of relevant education, experience and skills required.
- Experience as a lawyer or paralegal is a plus.
- Excellent interpersonal, organizational, written, and oral communication skills.
- Strong knowledge of basic office computing, including MS Office (Outlook, Word, Excel, PowerPoint, Teams), Zoom and basic database skills required.
- Strong interpersonal skills, ability to work collaboratively as a member of a team.
- Willingness to invest in ongoing professional development and education.
- Interest in the Jewish community and commitment to the goals of Jewish Federation of Palm Beach County.
- 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.
- Ability to maintain confidentiality of frequently sensitive and emotionally charged information.
- Ability to work well under pressure in fast-paced, rapidly changing environment.
- Ability to read and comprehend detailed documents and instruments and to perform detailed work using reasoning and problem-solving skills.
- Ability to maintain professional appearance in accordance with Federation dress code.
- Ability to multi-task and work within timelines.
- Ability to develop and cultivate trusted relationships and be a team player.
- Must be able to pass a Level 1 background check.
- Must be able to work off-shift hours including nights and weekends, as needed.

Compensation and Benefits:

In addition to a competitive salary, Jewish Federation of Palm Beach County currently offers the following benefits:

- A comprehensive benefits package including 15-25% of employee-only premiums paid for medical and dental and 100% of premiums paid for vision insurance.
• Federation contributions toward HSA accounts.
• Federation-paid Life/AD&D policy.
• Federation-paid long-term disability (LTD) insurance.
• Medical and dependent-care Flexible Spending Accounts (FSA).
• Hybrid work schedule.
• Professional development and training opportunities.
• Paid vacation and sick leave.
• Generous paid holiday schedule.

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

Federation strongly encourages applications from individuals with varied identities and backgrounds. As an equal opportunity employer, all individuals are encouraged to apply without regard to race, color, religion, age, disability, national origin, gender, sexual orientation, marital status, ancestry, genetic information, medical condition, veteran status, financial status, or any other class protected under federal, state, or local laws.

Federation is committed to the full inclusion of all qualified individuals. If accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact Mary Kay McGann at mary.kay.mcgann@jewishpalmbeach.org for assistance.

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

NO CALLS, PLEASE.