



## **Chief Development Officer**

**Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.**

**In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. You will also actively play a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main goals of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.**

### **SUMMARY**

The Chief Development Officer serves as a key leadership team member and an active participant in making strategic decisions for Filoli. The Chief Development Officer (CDO) will be instrumental in engaging the Board, the Chief Executive Officer (CEO), and the senior management team in the creation and implementation of a long-term development strategy that builds an institutional culture of philanthropy and a sustainable financial resource.

The CDO will help forge new relationships to build the organization's visibility and support by designing and implementing a comprehensive plan for cultivating philanthropic commitments. This position will oversee a comprehensive development function that strives to engage foundation, corporate and individual donors, personally overseeing a systematic major donor program. The development of long-term relationships for future growth and expansion of Filoli is paramount.

The CDO will strategically develop and lead the organization's Development function. Reporting to the CEO and serving as a member of the Leadership Team, the position leads development and fundraising efforts. Centered around developing and deepening donor and supporter relationships, this position serves as a key senior external representative for the organization. This position requires a results-oriented leader whose passion for Filoli's mission is matched with strong tactical leadership, outstanding interpersonal skills, nimble decision-making in the face of complex challenges, and a proven track record of nonprofit fundraising.

This is a full time (flexibly scheduled), exempt, salaried, and benefit eligible position. Salary is commensurate with experience. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. As a senior leadership position, the schedule will be flexible to meet the needs of the position and have an on-site presence including evenings and weekends. This position can work remotely up to 25% of the time.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:**

### **Leadership**

- Provide leadership working closely with the CEO, the Executive Team, and the Board of Directors on comprehensive long-term planning that supports sustainable growth of the organization and develops and implements Filoli's fundraising strategy;
- Serve as a strategic leader and a member of the C-suite team in establishing policies, developing creative solutions, and representing a unified voice for the overall strategic direction for Filoli;
- Support the Board of Directors and provide leadership to the Board of Directors Development Committee;
- Professionally and effectively, represent Filoli to external audiences, including individual and organizational contacts and the broader philanthropic community; Use external meetings, conferences, and speaking engagements to build the brand visibility and financial support that advances Filoli's mission;

### **Donor Relationships**

- Establish and maintain relationships with new and existing donors, securing and coordinating pertinent information, meetings and events. Create and manage a robust pipeline of potential donors. Oversee successful development activities such as donor cultivation events. Oversee best practices and ensure excellent customer service to all donors;
- Work closely with the CEO, Board of Directors, and the Development team to identify, cultivate, solicit, and steward major donors and prospects. Effectively engage Board members and external partners and advocates to communicate Filoli's message and philanthropic priorities effectively and to assist in identifying foundation, corporate, and individual donor prospects. Create tracking and communication systems for these relationships and provide written and verbal reports as appropriate. Engage the Filoli staff as needed to advance development goals;

### **Development**

- Strategically lead, manage, and execute a complex and growing development function for Filoli to sustain and grow the revenue base of Filoli by: building a comprehensive individual giving program that includes annual fund and major gifts; building a base of foundation support; creating opportunities for corporate donors and sponsors; developing a planned giving program through the Filoli Legacy Society; and designing a fundraising event platform to generate revenue and deepen relationships;
- Inspire and motivate the entire Development team to contribute their efforts to effective fundraising to meet the annual operating budget as well as future projects;
- Create customized communications to prospects, including appropriately personalized acknowledgements;
- Engage external partners, consultants and other resources for training and professional development to ensure staff have the latest tools and techniques and the board has confidence in the solicitation process;

### **Management and Cross-Departmental Collaboration**

- Lead a Development team and manage the annual development budget and annual department plan;
- Oversee effective and accurate use of Altru database, including providing organization-wide standards for use; oversee an internal team to ensure best use of database;
- Collaborate with the Management Team to develop project overviews, create an internal support network for donor meetings and events, and ensure that the organization's needs and priorities are being met;
- Collaborate closely with the Marketing team to ensure development messaging is aligned with overall institutional messaging and support the Finance team in their work to ensure that all administrative requirements for funders are completed in a timely fashion.

## **SUPERVISORY RESPONSIBILITIES**

Job titles of those who report **directly** to this position currently are: Development Coordinator (FT), Development Assistant (FT), and Database Coordinator (FT - budgeted for June 2021). Future positions could include part-time staff and interns.

## **QUALIFICATIONS**

**Education:** A Bachelor's Degree is required. An advanced degree and/or specialized training or certification in fundraising are ideal.

### **Core Competencies:**

- **ORGANIZATIONAL MANAGEMENT EXPERIENCE** – At least 5 years of experience serving as a member of the executive leadership team, providing guidance on organization's development strategies and successfully implementing the overall vision, strategy, and organizational development priorities. Experience developing creative structures of support/accountability among peers and teams. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **DEVELOPMENT** – At least 5 years' nonprofit development experience with demonstrated success managing individual and major donor relationships and securing grants from local and national foundations and corporations. Experience matching funding sources with program needs. Considerable experience creating, leading, and aligning development strategy with finance/budget, human resources, program development, organizational development, etc.
- **PEOPLE, PROJECT, AND PROGRAM MANAGEMENT SKILLS** – Exemplary people management skills, strategic leadership abilities, and the ability to link the development of people with achievement of organizational outcomes. Effective team leadership skills. Cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires. Strong supervisory skills and proven success supporting staff development and empowerment. Demonstrated experience organizing, managing, and evaluating events, campaigns, or programs.
- **LEADERSHIP** – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively with Filoli's many constituencies including staff, Board members, community partners, individual and institutional donors, and community supporters. A leader who can positively influence both strategic and tactical fundraising.
- **CULTURAL COMPETENCIES** – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- **DIVERSITY, EQUITY, AND INCLUSION** – Committed to Filoli's dedication to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.
- **COMMUNICATION SKILLS** – Exceptional oral and written communication skills including the demonstrated ability to research, and analyze information, compose reports and correspondence, and present proven data in a clear and inspiring manner.
- **DECISIVE NATURE** – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions, with understanding of the inherent risks and the implications of making tough decisions.
- **COMPUTER SKILLS** – Strong capacity for using donor databases. Proficiency with Google Suite and Microsoft Office applications.

## **Skills and Abilities:**

- Demonstrate a deep commitment to and enthusiasm for the mission and vision of Filoli;
- Detail and results orientated with intentional use of data to improve performance and processing information to make astute recommendations and/or decisions;
- Possess an organized and strategic approach to development with experience in managing, developing and coordinating successful fundraising efforts and a successful history of setting and meeting realistic fundraising goals;
- Ability to partner effectively and diplomatically with the CEO and key members of the Board of Directors in the development process, as appropriate;
- Possess a strong connection and commitment to San Francisco, Peninsula, and Silicon Valley fundraising community;
- Demonstrated success, with the ability to think strategically while executing tactically within a resource-constrained environment;
- Be an effective communicator who is articulate and persuasive in written and spoken communications -- adept at crafting proposals, donor correspondence and materials and making presentations to a variety of audiences;
- Highly motivated and energetic, ability to show initiative and work independently;
- Have experience managing a team of professionals, including the proven ability to mentor, train, and develop staff as well as the ability to create and maintain a collegial and positive work environment with high morale, professional standards and productivity;
- Display a high level of integrity and dependability with a strong sense of customer service, urgency, results-orientation, diplomacy, confidence and good humor;
- Ability to respectfully ask questions, challenge, and communicate both positive and difficult messages to subordinates, superiors, and peers; Speaks about issues truthfully and without blame;
- Sound judgment regarding the appropriateness of guarding confidentiality to protect the privacy rights of colleagues or donors;
- Ability to work in a fast-paced, change oriented environment;
- Follow-through to successful completion all projects and communications;

## **PHYSICAL REQUIREMENTS**

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry up to 20 pounds;
- Direct customer interaction;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend as well as sit for long periods of time at a computer and talk on the phone.

## **HOW TO APPLY**

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to: <https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

**Please visit our website for more information: [www.filoli.org](http://www.filoli.org)**

Filoli is an equal opportunity employer who values diversity in the workplace.