

Major Gifts Officer

As a Filoli team member, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. 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 pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education.

SUMMARY

The Major Gifts Officer is responsible for the development, implementation and evaluation of key fund development and community outreach strategies with the aim of increased donor identification, acquisition, cultivation, and stewardship. The position is responsible for managing or assisting in fundraising initiatives including the organization's major gifts, annual fund and individual giving, corporate partnerships, and other external engagement efforts, with the goal of forming and furthering relationships with donors, prospects, philanthropic organizations, and businesses.

Under general supervision of the Chief Development Officer, this position works with staff and board leadership to build and sustain a culture of philanthropy at Filoli. The Major Gifts Officer plays a role in setting the organization's operational priorities as well as implementing strategic plans, and works across departments to gather relevant information for donors, prospects, and external constituencies. The Major Gifts Officer works closely with External Relations to ensure fund development messaging is incorporated in relevant print and electronic communications.

This position is full-time with flexible scheduling and weekend/evening service as needed and, in accordance with HR policies, may periodically telecommute, work from home, and travel for off-site meetings and conferences. Depending on candidate experience, the salary range is \$35.00 - \$45.00 per hour. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k) (eligible after 6 months of employment), vacation, sick leave and holiday pay.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Major Gifts & Individual Giving

- Create and implement a written major gifts program including development of an annual strategy and plan, donor identification and prospecting, stewardship planning and project alignment;

- Identify, cultivate, solicit, and steward a portfolio of mid-level donors and major gift prospects with the goal of increasing the number and size of unrestricted gifts and building a robust major donor pipeline;
- Lead each step in the giving process including prospect research, donor and prospect cultivation, face to face meetings and solicitations, and donor stewardship;
- Track gifts and provide reports through the Blackbaud Altru donor management database;
- Support the fundraising efforts of the Chief Development Officer (CDO) and Chief Executive Officer (CEO) in securing new and renewed gifts;
- Work closely with the Database Specialist (External Relations) to ensure proper donor recognition in all publications and oversee accurate donor lists;
- Develop compelling cases for support to share with donors and prospects;
- Partner with the External Relations team to oversee and related marketing and communications efforts, including creation of materials physical and electronic and solicitations, gift processing and acknowledgment, gift and commitment reporting, and donor appreciation events;
- Coordinate with the Development Programs Officer on Annual Fund Plans to ensure appropriate custom mailing, list selects, integrated donor tracking and pipeline development for major donor development;
- Actively engage and support the portfolio management for CDO, CEO and Development Committee members;
- Build processes and tools such as data screening to support the major gifts program;
- Oversee the details of the Travel Program from trip planning to bookings and ensure this group of special donors is part of the major gift strategy;
- Ensure that Filoli Circle, collections donors, art purchasers and other supporters are integrated into the major gift strategy;
- In partnership with the CDO, continue to build the Legacy Society to recognize donors who have planned bequests, estate and other life gifts;
- In collaboration with the CDO, plan and give input on the organization's Development department annual budget, including budgeting for mailings, donor cultivation events, and setting goals for fundraising revenue;

Corporate Partnerships & Engagement

- Develop an annual sponsorship plan with a variety of programs and levels of support;
- Develop and oversee a corporate membership program;
- Build a pipeline of corporate prospects and a long-range plan for building corporate support;
- Ensure Filoli is engaged in all matching gift opportunities and promote to all donors;
- Develop and implement reporting and stewardship plans for corporate partners;

Audience Development & Community Engagement

- Use third-party nonprofit information sites such as Guidestar and Charity Navigator to engage Filoli's current and potential supporters, and ensure they contain accurate and up-to-date information;
- Contribute Development-related content to Filoli's magazine, e-newsletter, and other external communications as appropriate;
- Serve as an ambassador for external presentations to corporate partners and prospects;
- Join local rotary and neighborhood clubs to build relationships and share about Filoli;

Board Relations

- Serve as a staff representative of the Development Committee engaging board members as connections to prospective donors, corporate partners, and foundation gift prospects asking for their support in the fundraising process;
- Work closely with board members on their individual giving plans, and provide concierge service for their needs (scheduling tours, booking events, greeting groups, etc); Provide updates on annual/individual giving, foundation relations, and corporate partnerships for Development Committee meetings;
- Prepare relevant reports for Board of Directors meetings;

Administration

- Support all donor recognition programs by attending events, reviewing lists for donor reports and signs, developing gift plans and special communications; and ensuring proper gift acknowledgements;
- Provide weekly updates to the Chief Development Officer, and Chief Executive Officer (as requested) regarding department activities;
- Set formal standards for donor records management and, with assistance from the Development Programs Officer, maintain rigorous physical and digital files for major donors, major gift prospects, institutional funders, and major in-kind donors;
- Ensure Development-related folders on the organization's data server are up-to-date;
- Provide requested documentation to Finance & Accounting for the organization's annual financial audit;

Leadership

- Serve as a staff representative for the Development Committee;
- Serve as a member of the Editorial Committee;

General

- Work regularly with confidential information and ensure its security;
- Provide the highest quality service to all customers in every interaction;

- Uphold Filoli's policies, procedures, guidelines, and standards;
- Maintain flexibility and perform other duties as assigned as needed;
- Attendance and punctuality are essential to work and all work-related functions;

MINIMUM QUALIFICATIONS

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

Education and/or Experience

Education: Bachelor's degree and 4-6 years of experience in the field or in a related area, or an equivalent combination of education and experience;

Core Competencies:

- **DEVELOPMENT EXPERIENCE** – Four to six (4-6) years of experience in the development field or in a related area. Familiar with a variety of the development field's concepts, practices, and procedures: experience with managing an annual appeal campaign, including list management, segmented messaging, acknowledgement, cultivation and reporting processes; experience with foundation and grant proposals, funding, and reporting; experience with securing corporate donations and sponsorships, including stewardship and reporting.
- **PEOPLE AND PROJECT SKILLS** – Effective team leadership skills and cross-functional collaborative capacity. Experience with performing a wide variety of tasks with a broad range of individuals. Has completed projects where a wide degree of creativity and latitude was expected. Ability to either take direction or work independently as the situation requires. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **LEADERSHIP** – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively and build partnerships with Filoli's many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers.
- **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, ACCESSIBILITY, 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 DEAI 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** – Demonstrate excellent written and verbal communication skills. Ability to speak and make presentations to groups of people, both large and small.
- **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 decisions.
- **COMPUTER SKILLS** – Advanced computer skills, including Google applications and Microsoft products, management databases, and basic design and presentation programs. Proficiency in Altru (Blackbaud) or similar database preferred.
- **AVAILABILITY** – Maintain a flexible work schedule that includes evenings and weekends to meet the demands of executive management.

SKILLS AND ABILITIES

- Work and communicate successfully with a highly diverse population of current and potential donors, staff, volunteers, members, board members and the public;
- Ability to regularly make independent decisions of significant importance to the organization and demonstrate thoughtful judgement when taking actions independently;
- Work independently while maintaining open and transparent communications about duties and project status;
- Provide excellent planning and project management skills;
- Demonstrate consistent and exceptional attention to detail, resourcefulness and an ability to think through an issue and anticipate possible problems, obstacles, and conflicts;
- Demonstrate a strong customer service orientation;
- Be organized and follow through on tasks to a successful completion;
- Display impeccable discretion, confidentiality, judgment, graciousness and flexibility at all times;
- Take general direction, multi-task and work in an environment of regular interruptions;
- Serve as a collaborative team member with strong interpersonal skills and a sense of humor;
- Read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals.

CERTIFICATES, LICENSES, REGISTRATIONS

A valid Driver's License is required.

PHYSICAL REQUIREMENTS

The physical requirements described in this job description 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;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend as well as sit for long periods of time at a computer;

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

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