



## **Major Gifts 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 2024-2028 Strategic Plan and Capital Campaign. 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. We welcome and appreciate your contributions to Filoli.

### **SUMMARY**

The Major Gifts Officer is responsible for the development, implementation, and evaluation of key fund development and community outreach strategies to increase high-net-worth individual (HNSI) donor identification, acquisition, cultivation, and stewardship. The position is actively engaged in fundraising initiatives including the organization's major gifts, annual fund and individual giving, corporate partnerships, and other external engagement efforts, to form and further relationships with donors, prospects, philanthropic organizations, and businesses.

Under the 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 the Development Operations team to ensure fund development messaging is incorporated in relevant print and electronic communications.

The Major Gifts Officer position is a full-time and exempt position. Depending on candidate experience, the annual salary range is \$87,000 to \$102,000. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. This position will have flexible scheduling including weekend/evening service as needed and, in accordance with HR policies, may periodically work from home (on average up to 25% per week), and travel for off-site meetings and conferences.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES**

### **Leadership Gifts & Individual Giving**

- Manage the major gifts function and ensure portfolio development and assignment to staff;
- Coordinate with board and development committee solicitors on all tracking and action;
- Manage a portfolio of approximately 120-150 donors and prospects that research shows are qualified for \$25,000+ gifts;
- Create individual goals for each person in the portfolio based on the donor's history of giving and the organization's knowledge of that donor's potential and interests;
- Create a comprehensive plan for each donor/prospect in the portfolio and execute that plan so that individual donors are retained and upgraded;
- Engage in 10-12 meaningful meetings or exchanges with prospective donors or prospects a month;
- Directly solicit major and planned gifts, and partner with senior and program staff on donor engagement opportunities;
- Provide executive-level support to senior staff, board, and committee members in preparation for solicitation or stewardship opportunities, including appropriate, concise briefing materials in advance of meetings with donors and prospects;
- Facilitate solicitations for the CEO & President and Chief Development Officer (CDO) as appropriate;
- Qualify new prospects for assignment to the campaign portfolio every quarter using shared research tools and reports through the Blackbaud Altru donor management database;
- Work with the appropriate staff to secure project information and use this information to develop materials directed at individual donors/prospects, such as highly personalized proposals that are in line with donor interests and programmatic priorities, stewardship reports that detail progress made as a result of a particular gift, etc.;

- Develop and execute special cultivation and stewardship opportunities, such as small events for select donors/prospects in the portfolio;
- Partner with the External Relations team to oversee and related marketing and communications efforts, including the creation of materials physical and electronic solicitations, gift processing and acknowledgment, gift and commitment reporting, and donor appreciation events;
- Maintain working knowledge of programmatic and capital project priorities as they occur, including Filoli's five-year strategic plan and long-term Master Plan concepts;
- 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;

### **Capital Campaign Coordination and Facilitation**

- Support the launch of a Capital Campaign, including collaboration with other departments including Communications and Strategic Partnerships, to maximize the impact of the public launch, and help set the stage for campaign success;
- Prepare personalized proposals for individual prospects and write cultivation and solicitation correspondence;
- Update the financial existing tracking system for all campaign contributions;
- Ensure that campaign donors receive timely and accurate reports on the use of their gifts and campaign progress;
- Create donor strategy memos, letters, emails, and other related pieces for donors, prospects, program staff, and others;

### **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 acknowledgments;
- Provide weekly updates to the CDO, and CEO & President (as requested) regarding department activities;
- Set formal standards for donor records management and, with assistance from the Development Manager, 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 support staff representative for the Development Committee;
- Serve as a member of the Editorial Committee and Speakers Bureau;

### **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 2-4 years of experience in the field or in a related area, or an equivalent combination of education and experience;

*Significant experience in nonprofit fundraising, with progressive responsibility and a proven track record of soliciting, closing, and stewarding major gifts in the \$10,000-\$100,000 range.*

*Experience soliciting seven-figure gifts is highly desirable, and experience with planned gifts is also preferred.*

*Excellent interpersonal, oral, and written communication and presentation skills. Demonstrated ability to simplify complex themes and activities into a short, compelling presentation or written piece. Familiarity with talking about access to historic and open spaces to promote community building is helpful.*

**Core Competencies:**

- DEVELOPMENT EXPERIENCE – Two to Four (2-4) 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, acknowledgment, 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 worldviews. View racial and cultural differences as assets to the organization.
- DIVERSITY, EQUITY, ACCESSIBILITY, AND INCLUSION – Committed to Filoli's dedication to integrating accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion for 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 an 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 a similar database is 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 judgment 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 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 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](http://www.filoli.org)

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