

CHIEF PHILANTHROPY OFFICER

ORGANIZATIONAL OVERVIEW

The mission of Berkshire Taconic Community Foundation (BTCF) is to build stronger communities through philanthropy and leadership. We offer donors, nonprofits and community groups the tools and expertise to achieve their philanthropic vision and goals, and identify critical areas where the foundation can leverage its relationships and leadership for lasting impact. Founded in 1987 in Salisbury, Conn., Berkshire Taconic serves Berkshire County, Mass.; Columbia and northeast Dutchess County, N.Y.; and northwest Litchfield County, Conn. In all, we support the residents of 70 towns and three cities across three states, within a 2,200-square-mile region.

Like most community foundations, Berkshire Taconic offers a variety of fund types that allow donors and community groups to build charitable resources and make grants and other awards over time to achieve their philanthropic goals. BTCF has also proactively established funds to address a specific issue in our region or to develop permanent charitable resources to serve a set of communities. This has resulted in the creation and growth of 11 area funds, 33 educational enrichment funds that serve every public school district in our region, and special initiatives to address regional challenges, such as the shortage of high-quality early childhood programs and affordable housing options. In 2017, BTCF adopted a new strategic plan that is focused on three issue-based priorities: increasing educational attainment, from early childhood through adult learning; increasing community engagement; and fostering economic opportunity for all residents.

In total, the foundation manages more than 530 funds totaling over \$150 million in combined assets that together make between \$7 million and \$12 million in grants and other awards each year. BTCF is a learning organization that embraces a culture of high performance, transparency and flexibility. All staff participate in professional development activities on an ongoing basis and work cooperatively as a team, respectful of one another, the volunteer board that guides our work, and the nonprofits and donors who are our vital partners in improving lives around the region. More information can be found at www.berkshiretaconic.org.

POSITION OVERVIEW

Berkshire Taconic Community Foundation is at an exciting juncture as we focus on strengthening communities through philanthropy and leadership as set forth in a new strategic plan. We are expanding our team with a senior level position. Reporting to the President, the Chief Philanthropy Officer is a member of the foundation's management

team and is responsible for providing the strategic vision, staff leadership, and operational oversight for all asset development and donor engagement activities.

Using the foundation's strategic and multi-year advancement plans, this position supervises a staff team responsible for developing and achieving annual goals related to new fund development, donor engagement, resource development for strategic priorities, and volunteer involvement in advancement activities, including the board of directors. The position works with the President to identify metrics to be used track progress toward new fund development and donor engagement goals.

POSITION OUTCOMES

The successful Chief Philanthropy Officer will achieve the following outcomes over time, working with other staff, board and volunteers:

- Targets in multi-year advancement plan are met and/or exceeded
- Increasing annual average of new gifts or transfers to new and existing funds
- Increasing levels of donor engagement, as evidenced by growth in support from existing donors and new gifts to support strategic priorities. Additional targets and metrics will be identified by the new Chief Philanthropy Officer and management team to demonstrated aligned funding as a result of exposure to strategic priorities and staff interaction.
- The culture of philanthropy at the foundation is strengthened, with staff and board actively and effectively involved in new relationship development and outreach.

KEY RESPONSIBILITIES

- Lead implementation of multi-year advancement plan, identifying and executing against measurable goals for new fund development, both in number of new funds and in total dollars raised. In the first year, recommend changes to the plan based on implementation to date, experience and expertise.
- Oversee internal prospect development process, engaging staff, board, and other volunteers in the cultivation of new fund holders. Manage a personal prospect list of key potential donors and proactively conduct cultivation activities to move this group toward starting new funds.
- In line with strategic plan, work with President, Vice President of Finance & Administration, and the philanthropic services team to develop and meet annual fundraising goals to support implementation of strategic priorities, including revenue to support operations as needed.

- Support new and existing donors in gift planning that results in bequests and other planned gifts to the foundation.
- Oversee and support the director of philanthropic services in the development and implementation of donor engagement strategies for existing donors, including one-on-one stewardship activities, donor issue-based convenings, and regional events.
- Work with director of strategy, evaluation and learning to increase foundation's knowledge and practice around effective donor engagement and communicating foundation impact to donors and prospective donors.
- Lead and supervise staff team: develop annual work plans, department budgets and annual review processes for reporting staff.
- Engage volunteers (board of directors, board stewardship committee, and area fund committees) in new fund development and donor engagement activities. Participate in board activities as member of senior management team.
- Oversee and strengthen professional advisor program that includes outreach, communication, and continuing education offerings.

QUALIFICATIONS

Education:

- Bachelor's degree required; graduate degree and advanced designation (e.g., CFP, CAP, CFRE) highly preferred.

Experience:

- 10 years of fundraising/development experience with track record of soliciting and closing six- and seven-figure gifts
- Experience in goal-oriented advancement environments with success in managing teams to achieve annual fund and/or campaign objectives
- Experience with gift planning, including supporting donors in making sophisticated planned and unique gifts
- Experience with donor relations or donor services work

Skills:

- Strong manager of teams and able to supervise diverse duties

- Ability to set overall vision and strategy while also overseeing operational/tactical plans
- Technically astute and facile with drafting complicated gift plans
- Goal-driven fundraiser
- Complex and critical thinker with superior attention to detail
- Superior writing and oral presentation skills
- Conceptual and practical understanding of CRM database, constituent management and sector best practices
- Able to motivate/manage volunteer teams to set and achieve high expectations
- Adheres to very high standards of service and integrity
- Able to exercise discretion with highly sensitive and confidential information

COMPENSATION

Commensurate with experience and skills. Benefits include health, dental, life, disability, paid vacation, sick leave and contribution to 403(b) plan.

HOW TO APPLY

Please submit resume and cover letter to hr@berkshiretaconic.org. No calls please.

DEADLINES

Candidates are encouraged to submit materials until job is filled. Review of resumes will begin on Monday, July 9.