

HOPE SERVICES

Job Description

April 2008

Position: Major Gifts Officer

Classification: Exempt

About HOPE Services:

HOPE Services is a 56-year-old non-profit organization providing a full range of human services to address the evolving life-long special educational needs of infants, children, adults and seniors with developmental disabilities. HOPE employs some 450 human service providers, interventional specialists and special education practitioners, and serves some 3,000 individuals with developmental disabilities in five Northern and Central California counties. HOPE's mission is to improve the quality of the lives of such individuals by facilitating both their healthy cognitive and physical development and their involvement in community life. HOPE is dedicated to the belief that people with disabilities, even severe disabilities, are capable of extraordinary growth and development, and that if offered a progressive, personalized, family-centered and community-integrated service package, they can become independent, productive, contributing and fully included members of their community. HOPE Services provides programs and services for people with developmental disabilities, which include mental retardation, cerebral palsy, epilepsy, autism and other conditions closely related to mental retardation and requiring similar programming. Through a myriad of programs and services, including work training, job placement, developmental activities, professional counseling, infant services, senior services, community living services, and mobility training, we strive to help people with special needs achieve their fullest potential. Our vision is to understand the dreams of people with developmental disabilities and assist them, their families and members of the community in creating opportunities for those dreams to come true.

Major Gifts Officer Purpose:

With the Vice President Resource Development, the Major Gifts Officer is responsible for implementing a comprehensive major donor and planned giving program in all of HOPE's districts: San Mateo, Santa Clara, Santa Cruz, Monterey, San Benito, and Alameda counties. The position will focus initially on the fundraising activities for approximately 100 individuals and corporations capable of making a minimum annual gift of \$1K. The Major Gifts Officer also has responsibility for leading the agency's planned giving activities. The Officer is a frontline fundraiser who is responsible for increasing the number of major gifts and planned gifts from individuals and bequest expectancies HOPE receives each year.

Principle Responsibilities:

The Major Gifts Officer's primary role is to implement the Resource Department's individual major gifts and planned giving program; corporate major gifts for special events and programs, and secure large gifts in support of fundraising priorities. The Officer will fulfill an overall plan, which focuses on strategies and techniques for raising current and deferred gifts in all of HOPE's districts.

The Officer will be expected to develop and staff a list of current and planned giving prospects. He/She will identify and cultivate potential individual and corporate donors and will be expected to keep a robust schedule of personal visits and speak knowledgeably about HOPE Services, and giving opportunities. The Officer will be responsible for and evaluated on his/her success in increasing the number of current major gifts, bequest expectancies and life income gifts.

The Officer will provide training on major and planned giving to all frontline fundraisers and

gift prospect. The Officer will be expected to keep up with all income tax and government regulation changes that affect planned giving and outright gifts. He/she will be considered the office resource for this area and must be prepared to explain changes to other colleagues.

The Officer will oversee a comprehensive annual marketing plan for individual major gifts and planned gifts. With the Vice President of Resource Development, the Officer will define and identify appropriate target audiences and develop compelling major gifts and planned giving marketing materials.

He/she will regularly steward known individual and corporate major donors and planned giving donors. The Officer will be responsible for staffing HOPE's honorary society that recognizes donors who have included HOPE in their estate plans.

The following responsibilities represent the essential functions of the position, with other duties as assigned. An employee in this classification may be responsible for carrying out any or all of the following functions:

Identification/Research

- Work with donors, friends, volunteers, and board members to identify prospects capable of giving gifts of at least \$1K annually and planned gifts.
- Work with donors, staff, friends, volunteers, and board members to identify prospects capable of serving as table captains; attending as guests; and making gifts at HOPE's annual fundraising breakfasts/evenings.
- Manages the monthly Hour of HOPE tours, identifying and inviting guests
- Researches/identifies corporate donors for sponsorships of fundraising events and program-restricted gifts
- Manage all information relating to current major donors and prospects in a manner that emphasizes the highest standards of accuracy, timeliness, thoroughness, and confidentiality.
- Work with staff, volunteers, and board members to identify interests and background of donors and prospects.
- Build and maintain constituent relationships, maximizing institutional relationships with major-gift donors and prospects and deepening their engagement with HOPE.

Cultivation/Solicitation/Stewardship

- Fundraising from individuals and corporations through major gift campaigns, personal cultivation/solicitation, planned giving vehicles, and special events designed for corporate and individual donors.
- Identify, research, qualify, cultivate, and solicit major donor prospects for annual, special, planned, or major-gift fundraising opportunities.
- Coordinate existing and new major gifts, planned giving, capital and endowment campaigns
- Develop strategies for the cultivation and solicitation of individual and corporate major donors and donor prospects. Cultivation should include but not be limited to communicating HOPE program information to donors, to apprise them of HOPE, and reporting results of their gifts to the Vice President of Resource Development and other appropriate staff and volunteer committees.
- Solicit gifts from major donors and prospects, both independently and working collaboratively with other solicitors. Prepare proposals, letters, and customized collateral material as necessary.
- Manage all aspects of information pertaining to the background and interests of donors in order to increase their commitment to our mission.
- Manage donor meetings in order to assess affinity and ability; cultivate and steward; and

- Provide executive-level staffing, including appropriate, concise briefing materials in advance of meetings, for Vice President, attorneys, and volunteers.
- Coordinate events to attract prospective donors and engage them with HOPE programs, specifically the donor fundraising socials, fundraising breakfasts/evenings and Hour of HOPE tours held in various HOPE districts.
- Acts as one of the staff co-chairs of the HOPE Guild and works with Guild to obtain major sponsorship gifts for the biennial gala and stewards Guild members
- Work with donors, staff, friends, volunteers, and board members to cultivate and solicit prospects capable of serving as table captains; attending as guests; and making gifts at HOPE's annual fundraising breakfasts/evenings.
- Work with donors, staff, friends, volunteers, and board members to cultivate and solicit prospects for corporate sponsorships of fundraising events in select counties.
- Identify appropriate individuals for potential involvement in advisory groups or board membership.
- Identify opportunities for life-income, bequest, and complex-asset gifts to maximize opportunities that best address donor needs and interests.
- Create customized stewardship strategies for key major-gift donors.
- Acknowledge all gifts in an appropriate and timely fashion consistent with donor's solicitation and stewardship plan.
- Write and coordinate production of a biannual Legacy of HOPE newsletter for planned giving donors and prospects

Workplan Design, Evaluation, and Budgeting

- In the context of unit and department business plan, develop annual plan for donor portfolio and regional assignments. Monitor annual plan, results, and expenses, and modify as necessary
- Develop expert familiarity with assigned regions and programmatic needs; maintain current knowledge of key regional developments as they occur. Maintain working knowledge of agency programmatic priorities.
- Oversee the tracking of realized bequests and all trust administration activities and review and set planned giving policy with the approval of HOPE leadership. This involves working with executors and attorneys to facilitate the pay out of bequests.

Volunteer Management

- Engage board members, district development committee members, and other advisory boards in fundraising efforts in all districts, working with the Vice President of Resource Development and staff.
- Manage volunteer participation in all districts for major donor fundraising, including annual fundraising events

Minimum Qualifications:

A four-year college degree plus a minimum of 3 years demonstrated successful experience and effectiveness in individual and corporate major gifts and planned giving fundraising with a focus on prospect identification, relationship building and solicitation.

Reports to: Vice President Resource Development

Supervisory Responsibility: Yes

Required knowledge, skills, and abilities:

- Experience in creating and implementing major gifts, planned giving, and endowment or capital campaigns
- Experience working with volunteers, volunteer leadership and program staff in fundraising with individuals and corporations
- Experience in coordinating donor recognition and donor-designed special events
- Outstanding interpersonal skills; excellent research skills; and superior written and oral communication skills
- Ability to work well with diverse groups of stakeholders-funders, volunteers, staff, clients, and community members
- Strong initiative and self-motivation
- Relevant computer skills, including donor database, PC, Microsoft office, Excel
- Ability to work collaboratively and successfully as a member of a team
- Ability to organize, prioritize and meet deadlines, while effectively managing multiple projects simultaneously
- Good analytical and problem-solving skills; detail oriented with excellent follow-through
- Able to work independently and as part of a team
- Able to work flexible hours and travel as needed
- Interest in helping people with developmental disabilities; ability to relate to people with disabilities.
- Ability to relate to persons of all ages and diverse backgrounds, skills and abilities. Ability to present self in a personable, professional and energetic manner

Environmental Conditions:

Works in an office environment. Travel to meetings in all districts required; driving involved. Long periods of sitting. Use of computer, time spent on the telephone and in meetings (on site and off site). Periods of intense concentration. Travel to offsite locations, exposure to outdoor conditions. Must be able to safely lift 25 pounds. Must be licensed to drive a car. Requires some evening and weekend hours.

To Apply

Please send cover letter with salary requirements and resume to jdevine@hopeservices.org by May 2. No phone calls please. Prospective candidates will be contacted the week of May 5, 2008.

Employees will be required to be fingerprinted and are subject to clearance by the Department of Justice

AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER Racial/Ethnic Minorities, Women, People with Disabilities, and Vietnam Veterans are encouraged to apply for all positions.