

POSITION DESCRIPTION

TITLE: Chief Advancement Officer

REPORTS TO: President & CEO

POSITION STATUS: Full time, exempt

Surrey Services for Seniors (Surrey) provides services and programs to keep seniors living with independence and dignity and continue as engaged members of the community. Surrey served nearly 6,000 seniors in FY 18 and has an annual budget of approximately \$5 million, with significant funding through philanthropic support. Surrey is committed to the provision of high-quality programs and services for the most active to the frailest seniors in Chester, Delaware and Montgomery Counties in southeastern Pennsylvania. Surrey builds its strength and effectiveness in bringing together an active and strong base of volunteers of all ages together with a committed Surrey team to provide a variety of services to help seniors remain active and in their homes. Services include: transportation, home care services, in-home services, information, lifelong learning, nutrition support, fitness opportunities, health education and a range of other programs and services for older adults. Surrey has 3 senior community centers in Delaware County, 2 senior community centers in Chester County in addition to a Consignment Shop.

Surrey is seeking to fill the newly created position of Chief Advancement Officer (CAO) to strengthen the position of the organization in the philanthropic community and secure increased levels of philanthropic support essential to the furtherance and sustainability of the mission. The ideal CAO will have achieved high levels of success in development initiatives throughout his/her career, plus a combination of mature and effective leadership skills. S/he will become a key member of Surrey's senior leadership team, supporting its strategic plan through a dynamic and well planned, multi-faceted and comprehensive development program including Major Gifts, Planned Giving, Annual Giving, Foundation and Grants development and a future major Campaign. The CAO will be responsible for the development of strategies and the implementation of a plan to expand philanthropic support to achieve fundraising goals.

POSITION OBJECTIVE

The primary function of the Chief Advancement Officer (CAO) is the advancement of the mission and effective positioning of Surrey Services for Seniors to the general and philanthropic community. The CAO is responsible for the planning, management and oversight for the Development Program to secure philanthropic support required to support and sustain the mission. The CAO will lead a relationship--based Development Program including a major gift program, annual giving, foundation and grants program, donor and prospect relations, planned giving and other activities designed to build community engagement and secure philanthropic support. The CAO will also be the principal architect of planning and preparatory activities leading to a 40th Anniversary Campaign.

The CAO reports directly to the President/CEO and also works with the Board of Directors, Development Committee and other committees, donors and volunteers involved in activities focused on securing philanthropic support for programs and strategic initiatives. Strong focus will be placed on major gift development including the identification, cultivation and engagement of major donors in order to secure increased philanthropic support, and the identification of new opportunities to build and sustain the overall mission of Surrey. This professional will represent Surrey in the community, working with key stakeholders, philanthropic and community leaders, groups and organizations to build and sustain relationships integral to the support of current programs and long-term sustainability of the mission.

SPECIFIC RESPONSIBILITIES:

Management:

- **Program Oversight:** Leads a Comprehensive Development Program; ensures the integrity of all programs and operations to provide high-quality programs, cost-effective management of resources and compliance with short and long-range plans.
- **Board Relations:** Meets with Board members and Board Committees on a regular basis; attends meetings and provides reports, updates and other information to keep Board apprised of current activities and the overall status toward goals.
- **Program Administration:** Advances the philanthropic position of Surrey through a comprehensive scope of Development initiatives including: major gifts and planned giving programs; annual giving; major campaigns; foundation and grants development; events, and donor/prospect relations.
- **Financial Administration:** Prepares the annual revenue and expense budget for the Development Program, monitors compliance, operates within budget guidelines, and reports variances to the President/CEO.
- **Supervision:** Supervises staff, performs regular performance evaluations, creates a positive working environment, promotes open communications and facilitates a team approach toward the accomplishment of goals.
- **Professional Liaison:** Works in collaboration with consultants, financial and legal advisors as required to assure that donor needs and organizational goals are achieved.

Development Program:

- **Plan Development:** Creates and implements a Comprehensive Development Plan to meet the immediate and long-term needs of Surrey; presents plan to President/CEO and Board Development Committee for review and approval, makes presentations to Board and Committees and reports on its progress. Oversees research for funding sources and trends, with foresight, to help position Surrey ahead of major funding changes or trends.
- **Campaign Direction:** Manages all activities related to a major gift campaign including plan development, execution of campaign strategies, donor and prospect relations, recognition activities, gift and pledge management and reporting functions; participates in the identification, recruitment, and orientation of campaign leadership and volunteers and serves a primary liaison to leadership team and Board committees.
- **Case Development:** Works with the President/CEO to identify funding priorities, assists in the creation of the funding plan, writes compelling and inspirational case statements based on same, and presents case as appropriate during cultivation and solicitation meetings.
- **Major Gifts:** Works with the Board, committees and President/CEO to plan and execute a major gift program including prospect identification, prospect research and evaluation, and targeted cultivation, solicitation and follow-up strategies.
- **Planned Giving:** Works in collaboration with financial and legal advisors to market and manage estate gifts and planned giving program including identification, research and cultivation of prospects; development of solicitation strategy; participation in solicitation and donor recognition.
- **Foundation & Corporate Grants:** With the Director of Development, oversees Foundation and grant development activities directed to local, state, and national foundations and granting agencies including research, cultivation activities directed to trustees and representatives, preparation of proposals, presentations and periodic reports as required; works in collaboration with the President/CEO in the

effective cultivation and solicitation of key foundation and corporate donors.

- **Events:** With the Director of Development, works with committees and volunteers to plan and execute events focused on increasing awareness and engagement of the general and philanthropic community, cultivation of prospects and donors and increased support for programs and services.
- **Prospect Research:** Oversees prospect research functions including the maintenance of accurate and up-to-date prospect files for individuals, corporations, foundations, or groups who have the ability or inclination to support Surrey at a major gift level.
- **Cultivation & Solicitation:** Identifies prospects, develops cultivation plans and conducts lunches, receptions, meetings, and other cultivation activities for potential donors and participates in gift solicitation activities as appropriate.
- **Cultivation Materials:** Works with the Marketing Department to prepare cultivation and solicitation materials including case statements, proposals, grants, solicitation materials, and other collateral materials as needed.
- **Donor Relations:** Maintains an ongoing donor relations program with emphasis on major gift development, conducts personal visits, schedules luncheons and meetings, makes personal calls, produces correspondence, and other forms of donor communication.
- **Donor Recognition:** Develops the donor recognition program, identifies list of gift recognition opportunities for various interest areas and levels of giving, creates policies for gift recognition and administers its implementation.
- **Gift Processing:** Establishes and enforces policies and accounting procedures for the proper receipt, acknowledgment, and posting of charitable gifts, assures the timely acknowledgment of gifts within 48 business hours after receipt, and assure accuracy of donor files.

Professional:

- **Community Representation:** Serves as a representative of Surrey in the community, participates in community events, makes presentations, seeks involvement in professional and civic organizations, and identifies opportunities to strengthen the presence of the organization in the community.
- **Ethics & Professional Standards:** Maintains a professional demeanor in dress and behavior, treats people with respect & dignity, maintains all donor and prospect information in the strictest confidence.

QUALIFICATIONS, SKILLS & ABILITIES

Core Competencies: The successful candidate must exemplify the following:

- A deep commitment to the Mission of Surrey Services and a passion for helping older adults “live with independence and dignity and continue as engaged members of the community.
- Proven skills at planning, monitoring, and implementing a full cadre of Development Programs, and a record of accomplishments with campaigns, major gifts, planned giving and the successful management of a comprehensive development program.
- Effectiveness in the development and stewardship of committed relationships with philanthropic and community leaders, donors, volunteers, prospects and other key stakeholders critical to the advancement of the mission.
- Demonstrated success in the cultivation, solicitation and stewardship of major donors, using both traditional and innovative strategies to assure the achievement of goals.

- The ability to communicate the mission, vision and values of Surrey to all key stakeholders, and present an inspiring Case for Support that motivates donors and prospects to heightened levels of engagement and support.
- A strategic thinker with a strong work ethic for high quality performance and attention to detail.
- Ability and affinity to work collaboratively as a member of a team, bringing Board, staff, volunteers and philanthropic leaders together into a singular focused effort toward the achievement of goals.
- Experience working with program teams and constructing, articulating, directing, and implementing sophisticated development activities in a fast-paced non-profit organization.
- Dynamic interpersonal skills, including the capacity to relate on a highly personal level to a very wide variety of prospects, donors, and volunteers.
- A successful track record in managing multiple projects from initiation to completion in an organization of at least a similar size to Surrey.
- Direct operational experience in the areas of Comprehensive Development programs, campaigns, annual giving, major gifts, planned giving, donor relations/stewardship, corporate and foundation relations, and development operations.
- Excellent communication skills, both written and oral; ability to influence and engage a wide range of donors and build long-term relationships.
- Strong organizational and time management skills with exceptional attention to detail.
- Flexible and adaptable style; a leader who can positively impact both strategic and tactical fundraising initiatives.
- The highest standards of professionalism in behavior and demeanor to reflect the mission and values of Surrey to the community.

Skilled in:

- Microsoft Office suite
- Raiser's Edge software
- Social Media

Attributes:

- A person of character, integrity and passion with a commitment to supporting the senior community, the CAO will provide inclusive, respectful leadership as Surrey continues to expand its mission in the community.
- S/he will be an innovative thinker and creative generator of ideas, but s/he must also be able to develop, implement and manage strategies that inspire others toward achieving goals.
- High energy and passion and commitment to Surrey's mission and values.
- Highly-driven and results-oriented; mature & professional in action & demeanor.

REQUIREMENTS & CONDITIONS

- Bachelor's Degree from an accredited college or university.
- Minimum of 5 years of experience in Development with emphasis on major gifts including the cultivation and building of relationships with individuals, foundations, corporations, groups and other major funding sources. Experience with the management of a major campaign is a plus.
- Evidence of progressively increasing leadership responsibilities of a comprehensive development program.
- Strong written and verbal skills are essential.
- Experience in leading a Team.
- Development experience and knowledge of the greater Philadelphia area highly desired.

To apply, please direct inquiries including cover and resume to the Human Resources Department at jobs@surreyservices.org.