

POSITION DESCRIPTION

FOR THE POSITION OF

VICE PRESIDENT OF PHILANTHROPY

**The
Miami
Foundation**
For A Greater Miami

2021

POSITION DESCRIPTION

POSITION	Vice President of Philanthropy
ORGANIZATION	The Miami Foundation
REPORTS TO	Rebecca Fishman Lipsey President and CEO
LOCATION	Miami, Florida
WEBSITE	miamifoundation.org

INSTITUTIONAL OVERVIEW

Established in 1967, The Miami Foundation is building the philanthropic, civic, and leadership backbone for a stronger, more equitable Miami. Over the past 50-plus years, the Foundation has invested more than \$400 million into the community, and it houses more than \$380 million in assets focused on strengthening Greater Miami. The Foundation has partnered with individuals, families, and corporations who have created more than 1,000 personalized, philanthropic funds.

The Miami Foundation has worked hard to understand Greater Miami and what makes this unique community tick. Working to engage all Miamians in the effort to shape the future of the region, The Miami Foundation focuses on three pillars:

- ▲ **Leadership:** Stepping up to shine a light on important community issues, and mobilizing philanthropists, nonprofits and civic partners to take action as a united force for change.
- ▲ **Community:** Building deep relationships across communities with nonprofit leaders, civic leaders, residents, and philanthropists in order to best guide our region and our donors to make the greatest impact possible.
- ▲ **Philanthropy:** Stewarding a diverse portfolio of charitable investments and providing individualized philanthropic services, allowing people to make a positive impact through their giving



In an effort to bring the power of music to every child in Miami-Dade County, we've launched the Music Access Fund, a multi-million-dollar initiative, in partnership with philanthropist Daniel R. Lewis.

Highlights of The Miami Foundation's impact from 2020

- In the face of COVID-19, the Foundation partnered with Miami Dade County to lead a \$10 million recovery program for hundreds of nonprofits.
- As education and career opportunities migrated online, the Foundation launched an effort to bring broadband internet to 100,000 disconnected students and their families.
- The Foundation purchased hundreds of thousands of masks, gloves, and gallons of hand sanitizer to help nonprofits stay safe and ramp up their programming in the face of the pandemic.
- The Foundation launched a Racial Equity Fund to address systemic racism in our community and has raised more than \$1.4 million to support leaders at the frontlines.
- The Foundation mobilized philanthropists and helped lead the largest issues-focused community survey in history to help the new County Mayor devise a Year 1 action plan reflective of the voices of Greater Miami.
- The Foundation hosted 10 candidate forums to help locals be more informed and engaged in local elections, reaching 75,000 viewers.



In June 2020, The Miami Foundation launched The Racial Equity Fund to address persistent systemic racism in America and the Miami community. Thanks to generous donors and partners, the Foundation has multiplied its initial investment tenfold to provide support for organizations and individuals on the ground. (Pictured: S.O.U.L Sisters Leadership Collective)

Leadership

Rebecca Fishman Lipsey | President and CEO

Social innovator and former policymaker Rebecca Fishman Lipsey is the President and CEO of The Miami Foundation. Since her recent appointment, she has mobilized philanthropists, businesses and local leaders to invest in collaborative, cross-sector efforts to respond to the impacts of the COVID-19 pandemic and support the long-term recovery of our region. Already, her work has helped unlock more than \$15 million in recovery funds that will help restore health, opportunity and a thriving society for all who call Miami-Dade County home.



Rebecca Fishman Lipsey

Prior to The Miami Foundation, Rebecca was the founder and CEO of Radical Partners, a social-impact accelerator that incubates organizations seeking to strengthen Miami. Radical Partners engages more than 100,000 Miami locals each year to strengthen their own communities through their initiatives

including 100 Great Ideas, ConnectMiami, Vote Miami, and Public Transit Day. More than 100 social innovators have scaled their ventures as alumni of the RP accelerator, addressing issues including education, health, housing affordability, civic engagement and access to the arts.

Before launching Radical Partners, Rebecca served as Executive Director of Teach For America in Miami-Dade. Under her leadership, the organization tripled in size and fundraising efforts multiplied 16 times over. She became the youngest person in history to be appointed to the Florida Board of Education, where she served a four-year term, overseeing educational policy that impacted 3 million students from kindergarten through college.

Rebecca is an alumna of The Miami Foundation's Miami Fellows program (Class VI). She is also the 2017 recipient of the Foundation's Ruth Shack Leadership Award, which annually honors an individual age 40 or under who reflects steadfast ethics and unselfish service to Greater Miami.

She was named "Best Non-Profit Executive" by The International Stevie Award for Women in Business; "Best Role Model" by Miami Today; and "20 Under 40" by The Miami Herald. She began her career as a teacher in Harlem, NY. She holds a master's from Bank Street College of Education and graduated as valedictorian of her University of Pennsylvania undergraduate class. Alongside her work building a stronger Miami, Rebecca also serves as a personal assistant to two young boys.

Richard A. Berkowitz | Board Chair | Founding and Executive Chairman, Berkowitz Pollack Brant

Richard A. Berkowitz is the founding chairman of one of South Florida's largest advisory and accounting firms. He works with CEOs on strategy, problem solving, succession planning, corporate culture, leadership development, mergers and acquisitions, areas he also leads for the firm. Berkowitz is a founder and Chairman of Provenance Wealth Advisors, one of the largest national CPA-affiliated financial planning firms. Berkowitz is active in community organizations in Miami-Dade and Broward Counties that focus on community problems and cancer research. A lawyer and accountant, he is a member of the American Arbitration Association and the Florida Academy of Certified Mediators.



Richard A Berkowitz

The Miami Foundation has a highly engaged and diverse board of community leaders and experts representing a wide range of industries. The full list of names/bios can be found here: miamifoundation.org/board.

CONTEXT FOR RECRUITMENT AND ROLE SUMMARY

The Miami Foundation exists to strengthen Greater Miami. When the going got tough during the past year, the Foundation stood together and invested powerfully in the community's recovery. The Foundation demonstrated the impact of united, strategic, equity-minded philanthropy, and the

importance of growing the charitable muscle the Miami community needs, for today and for our future. The Foundation team secured \$69 million in new gifts and planned/estate promises in 2020, and scaled up grantmaking and community strengthening efforts significantly to respond to the needs across Greater Miami.

2020 was a powerful reminder that The Miami Foundation is greater than the sum of its parts. When community needs increased substantially in the face of hardships, the Foundation stood up, gave generously, and impacted change as a united force, leveraging decades of insights and expertise. The Miami Foundation exists for moments just like this. The Foundation protects and sustains a more equitable, more resilient, more magical Miami for all who call this place home.

Amid this favorable backdrop of community leadership and expansion, The Miami Foundation seeks candidates for Vice President of Philanthropy (VP). The VP plays a critical role in growing The Miami Foundation's ultimate impact on the region at large. The VP will lead the creation and implementation of a comprehensive philanthropy program and strategy to identify, cultivate, and secure new donors; advance a comprehensive planned giving program focused on professional advisor outreach; formulate and execute plans to increase community philanthropic partnerships; and ensure facilitation of all gifts from prospective donors, including non-cash, deferred, and testamentary gifts.

Reporting to the President and CEO, the VP is a member of the Foundation's Leadership Team and is responsible for leading the Philanthropy team, presently comprising approximately five staff. The VP works closely with the President and CEO, Senior Director of Philanthropic Services, Leadership Team, and the Board of Trustees, and provides a high-level of internal and external leadership on behalf of the Foundation.

The VP will lead the Foundation team and Board to cultivate and strengthen relationships that ultimately grow the ability to impact positive change in Miami.



*Farmworker Association of Florida, Inc.,
2020 Community Grants Recipient*

Principal Duties and Responsibilities

Fund Development

- ▲ In collaboration with the President and CEO, develop and manage implementation of an integrated, comprehensive strategic plan for development activities. Establish and manage the attainment of annual and long-term goals aligned with Foundation priorities.
- ▲ Collaborate with the President and CEO, leadership of the Board of Trustees, and philanthropy colleagues, among others, to identify and refine giving priorities.
- ▲ Serve as the Foundation's lead philanthropy officer and ensure strategic management of activities for donor identification, cultivation, solicitation, and stewardship. Identify, cultivate, solicit, and

close major gifts via individual and institutional sources, professional advisors (attorneys, accountants, wealth managers, and trust officers), and nonprofit and community groups encouraging their giving to/through the Foundation. Model effective prospect strategy, approaches, and techniques, as well as transparency and collaboration, serving as a resource to colleagues on related matters. Contribute to and drive an organization-wide culture of philanthropy.

- ▲ Lead and oversee donor cultivation and solicitation opportunities that involve the President and CEO, Leadership Team members, Trustees, and other high-level volunteer leaders. Manage connections between these leaders and prospective or current donors, ensuring the preparation of strategic communications, reports, briefings, and other materials, as necessary. Exercise sound judgment and efficiently communicate prospect strategies when involving Foundation or volunteer leaders.
- ▲ Ensure ongoing discovery of new major and principal gift prospects, including both traditional and non-traditional sources of potential support, as well as examination of existing donors that may have greater capacity. Maintain current knowledge of important developments across regional and national funding environments as they relate to the Foundation, its programs, and giving priorities.
- ▲ In strategic partnership with the President and CEO and the Board Chair, identify potential Trustees, create stewardship and engagement opportunities for Trustees, educate Trustees about their role in advancing a culture of philanthropy, cultivate and solicit Trustees' financial support, and leverage their respective networks to expand the donor base.
- ▲ Coordinate with the Senior Director of Philanthropic Services on donor relations, donor engagement, and gift processing efforts and services. Support the Philanthropic Services team, which develops and delivers donor relations and engagement programming, including donor education events.
- ▲ Collaborate with the Philanthropic Services team to develop strategies to involve current donors in Foundation programs and donor-leveraged grantmaking efforts.

Professional Advisor Engagement and Complex Gifts Management

- ▲ Serve as lead staff liaison to professional advisors including managing the Professional Advisor Committee and broader network.
- ▲ Regularly engage and present to professional advisors and their firms to ensure the Foundation is top of mind for their clients' philanthropic planning.
- ▲ Lead promotion and facilitation of all complex gifts, including bequests, planned gifts, real estate, closely held business interests, and private foundation conversions.
- ▲ Manage estate administration for bequests, including any estate litigation interface with legal counsel.
- ▲ Remain informed on legal and technical issues related to community foundations and the philanthropic field as it relates to current and prospective donors and gifts; advise the Board and staff on these issues, as necessary.

Management and General Responsibilities

- ▲ In partnership with the Leadership Team, help build a thriving, joyful, high-performing work culture that is highly collaborative both internally and externally, and that echoes the organization's highest values.
- ▲ Oversee the hiring, management, mentoring, training, and evaluation of a best-in-class philanthropy team. Set appropriate annual goals and monitor progress on a regular basis to maximize staff performance, ensuring the utilization of appropriate metrics on a team and individual basis.
- ▲ Ensure the philanthropy team's optimal organizational structure, systems, and use of technology, including a strong system for maintaining up-to-date and accurate records of contacts with donors, prospects, and professional advisors. Ensure effective administration of gifts, maintenance of donor records, and communication of donor and fund information, tracking donor contacts and interests, recognizing donors through new and existing programs, and ensuring timely delivery of reports and communications.
- ▲ Prepare regular reports and presentations on development activities to the President and CEO, Leadership Team members, and Board of Trustees.
- ▲ Support the analysis of development activities and benchmark with peer institutions to ensure MSM is on track and employing best practices.

Communications and External Leadership

- ▲ Ensure effective, ongoing, and productive communication with current and prospective donors. Collaborate with the communications team to ensure integrated, consistent, and effective marketing and communications in support of development initiatives and charitable giving programs, and to communicate new donor and fund development results to the Board of Trustees, donors, and the general community. Strategically leverage a variety of communication channels and platforms to support fundraising goals, including digital platforms and social media.
- ▲ Proactively seek opportunities to deliver presentations to boards, agencies, professional, and civic organizations regarding Foundation giving resources and serve as an external spokesperson for the Foundation with a focus on charitable giving issues and the state of nonprofit philanthropy to serve as a source of wisdom both internally and externally.
- ▲ Engage in community outreach and maintain positive relationships with Foundation constituents, community and business leaders.
- ▲ Other duties and special projects as assigned.

CANDIDATE PROFILE

Professional Skills and Competencies

- ▲ Seven or more years of progressive responsibility in nonprofit fundraising, including extensive experience managing all dimensions of a comprehensive fundraising program (individual giving, institutional giving, annual giving, major and planned giving, stewardship, board relations) and leadership in a major fundraising campaign (planning, implementation, management, and successful conclusion).
- ▲ Strong grasp of and commitment to best practices in all areas of philanthropy and experience integrating giving programs at various levels to cultivate greater donor commitments.
- ▲ Experience leading a highly effective philanthropy team, with a strong record of providing strategic and operational leadership, including creating and managing a budget. Demonstrated ability to recruit, coach, mentor, motivate, and ensure ongoing professional development of staff; foster a cohesive team and an environment of trust, collaboration, professionalism, and transparency; and increase effectiveness and accountability through established objectives, performance standards, and guidance.
- ▲ Experience in developing the case for support and strategic fundraising plans, particularly a major fundraising campaign, and executing plans to achieve goals and objectives. Demonstrated experience cultivating, training, and working collaboratively with senior-level colleagues, board members, and other high-level volunteer leaders on successful development-related activities.
- ▲ Successful track record of personally cultivating, soliciting, and stewarding major gifts from individual and institutional donors at the level of six to seven-figures or greater. Strength in prospect discovery and in building effective strategies to compel new major donor investment.
- ▲ Demonstrated ability in planning and executing integrated, strategic, and innovative communications in support of achieving fundraising goals, including leveraging digital and social media. Experience identifying and coaching project spokespeople, and in partnering with marketing and communications colleagues to implement strategies that broaden the donor pool.
- ▲ Demonstrated analytical and organizational skills in evaluating existing programs, conceiving and implementing new programs or strategies, and resolving operational and interpersonal issues. The ability to extract and analyze data to make effective, efficient decisions about donor strategy and process, as well as working knowledge of modern data management practices and innovations that can streamline the development process and contribute to the integration of related functions.



*The Fountainhead Residency,
2019 Pérez CreArte Grants Program Recipient*

- ▲ Excellent skills and experience with Microsoft Word, Excel, and Outlook, as well as working with databases and Internet research. Experience with Blackbaud software is a plus, but the ability to learn and become proficient with this software is a must.
- ▲ A forward thinker with a track record of utilizing new methods of donor engagement and connectivity, who will be driven by innovation in developing philanthropic best practices in the current and post-COVID-19 world.
- ▲ Availability to work outside of traditional business hours, to travel locally, and to occasionally travel regionally and nationally, consistent with public health guidelines.

Personal Characteristics

- ▲ Passion for the work of The Miami Foundation and joy for fundraising, including enthusiasm to make asks and manage donor relationships. An appreciation of the role of philanthropy in building community.
- ▲ Unimpeachable integrity and high ethical standards; mature judgment in handling sensitive information. Servant leader who is values-driven, committed to personal and professional development, and leads by example. Elevates institutional goals and values beyond personal gain, ensuring efforts are mission-focused and quality driven.
- ▲ Culturally competent with respect to issues such as racial, cultural, religious, sexual, generational, and gender identity and committed to diversity, equity, and inclusion.
- ▲ Emotionally intelligent and self-confident leader with the interpersonal skills to develop and sustain impactful relationships with internal and external stakeholders from disparate backgrounds. An approach that is collegial, collaborative, and transparent, with the ability to also be extremely effective independently.
- ▲ Superb written and oral communication skills, with the presence, demeanor, sense of humor, and comfort level to serve as an inspiring, highly visible ambassador of the Foundation.
- ▲ An energetic self-starter who is highly organized, detail-oriented, and able to perform and prioritize multiple tasks efficiently and effectively, including via delegation, as appropriate. A bold, creative thinker with a bias toward action, as well as an openness to new ideas and adaptability.

This list of essential responsibilities and requirements is not intended to be exhaustive. The Miami Foundation reserves the right to revise this position description as needed to comply with actual job requirements.

The Miami Foundation is an Equal Opportunity Employer. EOE M/F/D/V.



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