



Job Title:	<i>Managing Director of Development Operations &amp; Donor Services</i>
Reports to:	<i>Chief Advancement and Development Officer</i>
Date:	September 2022

## **BIG SHOULDERS FUND**

Big Shoulders Fund is an independent tax-exempt charitable organization that serves lower-income schools which provide a values-based education for children, thereby contributing to stronger communities. We serve students in 92 schools in the Chicago area and Northwest Indiana. Each school is a vital resource for students, families, and communities, with research showing that when a Big Shoulders Fund school closes, the surrounding area experiences an increase in violence and a decrease in social cohesion.

For more than thirty-six years, Big Shoulders Fund has helped children achieve their dreams through access to high quality education. We accomplish this by investing over \$35 million annually in scholarship support and enrichment programming for students; operational improvements for schools; cultivation of talent pipelines for school personnel from new teachers through veteran principals; and professional development and support for educators and leaders – all with the goal of not just strengthening schools, but whole communities, while preparing students for life-long success. A recent survey of a sample of alumni of Big Shoulders Fund schools showed African-American alumni graduated from college at a rate more than twice the national average and Hispanic alumni graduated at a rate more than three times the national average.

## **POSITION OVERVIEW**

The *Managing Director, Development Operations and Donor Services* is a systems-oriented fundraising strategist. A leader who likes to lead from behind the scenes, the *Managing Director* optimizes the tools that empower external fundraisers to meet ambitious fundraising goals, while improving the donor experience, serving in a sense as the “chief operating officer” of the Development Team. The ideal candidate is a creative problem-solver who is energized by organizing and optimizing processes; possesses a mindset oriented toward continuous improvement; thrives in a fast-paced environment; and can work collaboratively within and across teams, managing people at a variety of levels within the organization.

This position works closely with the *Chief Advancement and Development Officer*, leadership staff, and front-line fundraisers to translate annual revenue targets into actionable strategies while providing functional leadership and process expertise. This includes, but is not limited to: policy development, grants and institutional fundraising, campaign planning, donor cultivation and stewardship activities, data management and coordination of staff.

The *Managing Director of Development Operations and Donor Services* works across departments to help drive new workflows, operationalizing sector best practices, and cultivating an organizational commitment to shared leadership and innovation. This position requires a demonstrated ability to identify problems and opportunities, evaluate alternative approaches, generate data-driven solutions, and facilitate interaction with key stakeholders with sound judgment and a high-level of self-direction.

**This position currently has three direct reports:**

- *Assistant Director, Donor Relations and Stewardship*
- *Manager, Donor Services and Systems*
- *Manager, Grants and Institutional Giving*

**Essential Job Functions:**

Build and drive streamlined development operations

- Lead execution of donor relations and recognition activities (e.g. data analysis, segmentation and moves management planning) to foster partnerships with high-value institutional funders, major individual donors, and other key stakeholders; creating and executing appropriate stewardship plans; and drafting/coordinating nuanced, tailored materials.
  - Design, lead, and evaluate the systems, processes and tools that allow for the efficient and accurate operational components of the fundraising and marketing teams, including constituent management, analytics and reporting, gift management (processing, acknowledgments, and agreements), and high-quality prospect management for the development team.
- Supervise proposal development, grants administration, and post-award activities.
- Manage end-to-end planning and execution of direct mail appeals.
- Provide necessary and accurate data analytics to streamline fundraising activities.
- Oversee the selection, performance management, and development of direct reports, working closely to grow skill levels in fundraising and cross-functional collaboration to achieve fundraising goals.
- Gather requirements, develop specifications, and lead the documentation of new processes and procedures (gift acceptance policies, planned giving, etc.).
- Measure, monitor, and provide feedback regarding business process performance.
- Project manage major and/or cross-functional initiatives.
- As a member of the Big Shoulders Fund Leadership Team, participate in long-range strategic planning and leadership for the organization.

Oversee portfolio management and prospect management/research

- Develop and support the implementation of multi-year cultivation, solicitation and stewardship plans for major gifts, corporate and institutional supporters; facilitate deeper connections between donor interests and philanthropic goals.
- Lead and manage donor segmentation strategies; continuously monitor and make recommendations for improvements, as needed.

- In partnership with *Chief Advancement and Development Officer* and the *Salesforce System Administrator*, create a prospect rating system embedded within Salesforce and the newly integrated prospect research application (iWave).
- Ensure all written communication with, and reports from, high-level development prospects are captured in and reportable from Salesforce.
- In partnership with *Salesforce System Administrator*, research potential new donors for Big Shoulders Fund *President/Chief Executive Officer (CEO)* and *Chief Advancement & Development Officer (CADO)* to approach and cultivate; create and implement moves management plans.
- Prepare private and public acknowledgment opportunities to recognize donors.
- Prepare and present monthly revenue projection reports that outline funding secured.
- By partnering with the *Assistant Director*, ensure donors receive reports on the impact of their giving.
- Develop unique acknowledgement and public and/or private recognition opportunities for major donors through public and private recognition.
- In conjunction with others, monitor, evaluate, and demonstrate success of the program with data, metrics, and stories.
- Lead creation of strategic stewardship plans that thank donors; support portfolios of CEO and CADO while maintaining ownership of own portfolio.

#### Supervision of donor services functions

- Supervise the execution of an array of donor services and data administration activities including:
  - Timely and accurate gift processing, pledge management, and acknowledgement letter production.
  - As needed, support finance and program departments in execution of pre-and-post-grant award activities including budget development, revenue forecasting, financial and programmatic reporting.
  - Oversee development and implementation of data and systems integrity plans to ensure high-level quality control, assurance, and security.
    - Investigate and lead efforts to analyze and improve effectiveness of systems-driven constituent (current and prospective) engagement and pipeline development activities.
    - In collaboration with others, create tools and dashboards for fundraising teams.
    - Oversee cross-functional work with the finance team to maintain accurate records and schedule of receivables (donor pledges and commitments) and award requirements.

#### **Other Duties**

- Work cooperatively with Big Shoulders Fund staff and perform other duties as assigned by the *Chief Advancement and Development Officer*
- Collaborate with and support the *Director, Donor Engagement and Corporate Partnerships* in:
  - Coaching and mentoring members of the Development team;

- Strategic and tactical planning and execution of Next Generation Boards activities, special events, volunteer engagement opportunities, etc.;
- Developing and executing integrated marketing communications activities.
- Support the overall mission of Big Shoulders Fund through its outreach to donors, fundraising events, school service days and other programs.

## **Requirements**

- Minimum of a Bachelor's Degree
- 10+ years of experience in fund development, higher education alumni relations, nonprofit management or a related and relevant field; experience in education-related nonprofit preferred
- 5+ years prior supervisory experience
- In-depth understanding of all aspects of development
- Experience leading / managing projects with a problem-solving mindset and strong facilitation skills
- Ability to handle sensitive and/or confidential constituent data pertaining to scholars, donors, volunteers, and other stakeholders
- Have equal comfort with and willingness to take on high-level conceptual work and to engage at a granular level
- Exceptional editing and proofreading skills
- Proficient with CRM systems and fundraising applications; experience with Salesforce preferred
- Commitment to excellence with strong organizational ability and exceptional attention to detail
- Highly motivated and adaptable with a strong work ethic; operate with honesty, integrity, and a positive attitude
- Ability to work on several projects concurrently while effectively managing priorities and meeting deadlines
- Strength in establishing and maintaining cooperative and effective working relationships with others
- Cultural sensitivity and ability to work collaboratively with diverse groups of people
- Commitment to and passion for improving access to high-quality, values-based education options for all children
- Appreciation for the benefits of a Catholic education for students, families and communities
- Ability to work some weekends and evenings for Big Shoulders Fund events and initiatives

**NOTE:** *This job description is not intended to be all-inclusive. Employee may perform other related duties to meet the ongoing needs of the organization and the students/schools it serves.*