
PERFORMANCE PROFILE FOR:

Vice President of Advancement

EMPLOYER:

**Jewish Senior *Life* Foundation
("JSLF")**



Jewish Senior *Life*
FOUNDATION

Jewish Senior *Life*: State-of-the-art facilities and services for seniors in our community

Jewish Senior *Life* ("JSL") is a \$60 million dollar, best-in-class organization, keenly focused on supporting the ever-changing needs of seniors in the Greater Rochester region. At a time when many long-term facilities are cutting programs, Jewish Senior *Life* is in the final stages of a multi-year, \$83 million development project that will re-define transitional and long-term care in the region and ensure that Jewish Senior *Life* remains state-of-the-art for decades to come. In September of this year, JSL celebrated the grand opening of three Green House Cottages that house nine homes for long-term care residents. The "Green House" concept represents the best in modern long-term care, banishing traditional institutional care concepts in favor of individual resident choice and freedom. Residents decide when to rise and go to bed, when to eat, and what to do with their time. Residents aren't asked to do things for the convenience of the staff, rather staff strives to achieve the individual needs and goals of residents. If that isn't exciting enough, JSL's current six story long term care facility (recently renamed "Farash Tower") is being completely renovated, converting to a 100% private room facility with modern amenities and the aforementioned philosophy of resident-centered care.

Jewish Senior *Life* qualifies as the community's only designated Continuing Care Retirement Community, offering a full complement of senior services, from senior retirement communities, including independent living, assisted living and long-term care, to community-based services. Jewish Senior *Life*'s independent living community is offered at The Summit at Brighton, assisted living at Wolk Manor, assisted living for memory care residents at the Lodge at Wolk Manor, daytime respite care for individuals with dementia at Marian's House (located off-campus), and skilled nursing at the aforementioned Green House Cottages and Farash Tower facilities- all located on the same beautiful campus.



In addition to long term care for aging adults, JSL's Farash Tower also offers state-of-the-art outpatient rehabilitation services, memory care services, Living Well Companion Care for individuals requiring non-medical assistance in their homes, handyman services, meal delivery services, an adult day health care program, hospice care, transitional care and a physician-led house calls program for housebound seniors. All facilities and services offered by Jewish Senior *Life* enjoy a strong reputation for quality as evidenced by ratings that put JSL in the top 15% of skilled nursing facilities nationwide. The organization is known for meeting the physical, emotional, mental and spiritual needs of patients, families and caregivers. Jewish Senior *Life* is considered a provider of choice in the greater Rochester community, with demand-driven waiting lists for the spectrum of services offered therein.

The workforce of 1200 employees at Jewish Senior *Life* is stable, with strong staff retention in an industry that is often plagued by frequent turnover. Professional staff report that the organization's talented, visionary leadership, strong reputation for quality services, and competitive benefits package are primary drivers of the decision to stay. JSL and JSLF also take great pride in their equally diverse workforce, and the organization has been rated by the Rochester Democrat and Chronicle as a top Workplace.

A Common Misconception- does JSL only provide services to Jewish clients and residents?

JSL exists to support *anyone in need of their services* in the Greater Rochester region, not just Jewish clients and residents. Approximately half of all clients and residents of JSL are Jewish, with the other half representing a wide variety of other religions and affiliations. Inclusion is a foundational Jewish value, in addition to meaningful life, compassion, choice and dignity.

Jewish Senior Life Foundation (“JSLF” or the “Foundation”)

The Jewish Senior *Life* Foundation is a separate but closely-related entity, with an independent board of directors and its own staff. The Foundation's mission is to raise the financial resources necessary to enable Jewish Senior *Life* to offer important programs and services to community elders so that they may lead meaningful lives with choice and dignity.

The Foundation employs a motivated, engaged staff of six who make it all happen. The team achieves its goals through a variety of fundraising initiatives: major gifts, annual appeal, planned giving, stewardship and cultivation events, two-levels of giving circles, foundation appeals and government grants. For the past four years, the Foundation has focused much of its efforts on the Power of One Capital Campaign, achieving the campaign goal of \$27 million. Proceeds of the campaign supported the aforementioned construction of the Green House Cottages and the renovation of Farash Tower, to be completed by the summer of 2019.



Over the years, diligent efforts on the part of the Foundation's staff, Board of Directors and volunteers has raised an endowment of approximately \$50 million to support the mission of Jewish Senior *Life*, significantly larger than the endowment of comparable organizations.

THE OPPORTUNITY – shape the future of JSL's success

JSL senior leadership and the JSLF board of directors are seeking an expert in advancement to lead the Jewish Senior *Life* Foundation into the future. As JSL has grown, older systems, processes and fundraising practices within JSLF have become increasingly strained. The successful candidate will fearlessly apply knowledge gained from prior successful leadership engagements to hone the Foundation into a respected, efficient, productive and forward-thinking organization. Our region is still in the early phases of the Age Wave, necessitating a re-imagining of target donors, donor cultivation practices (annual giving, giving societies, events, major gift solicitation, etc.), stewardship practices, data analytics and measurement practices, marketing methods, and the underlying “Case for Supporting JSL.”

Senior leadership of JSL and the JSL/JSLF boards of Directors have made the success of the Foundation a top priority. In 2017/2018 the organization engaged a consulting firm with advancement expertise to conduct an analysis of overall performance and current practices of JSLF compared to peer organizations. The successful candidate will analyze the firm's observations and recommendations and then team with senior management and the consulting firm to develop a three-year action plan.

One result of the study is clear: Annual unrestricted fundraising efforts will be a primary focus of the organization for the medium term. While the aforementioned Power of One Capital Campaign was very successful, and the organization's endowment is significantly larger than peer institutions at \$50M, annual gifts are significantly lower than desired. The successful candidate will establish a culture of identifying and cultivating new donors, and diligently stewarding those donors to elicit larger gifts over time.

The successful candidate should be equally attracted to the prospect of reaching out to an entirely new, undeveloped list of potential donors. Most peer Continuing Care Retirement Communities receive half of their donations from residents, a number that is quite low for JSLF by comparison. Another untapped source of potential donors can be found among appreciative patients/clients of the in-patient and outpatient rehabilitation programs, the Physician House Calls Program and the Living Well Companion Care program.

JSL/JSLF has a substantial base of loyal Jewish donors and foundations who regularly support the ongoing high-quality programs and initiatives of the organizations. The greater Rochester region has a vibrant Jewish community of approximately 19,000 members who support multiple cultural/social organizations and synagogues. The most recent demographic survey reports that more than half of Jewish community members were born outside of Rochester, yet only 2% to 4% of all Jewish community members plan on moving away – in other words, recent transplants and multi-generational members of the Jewish community love this region. While eighty three percent of Jewish community members are affiliated with one or more Jewish organizations in the Greater Rochester region, the board and senior leadership of JSL/JSLF are confident that the successful candidate will find significant growth opportunities from this core donor/prospect base.



Non-Jewish residents and transitional care patients are significantly under-represented as donors of the organization they know and love. Residents of the Cottages and Farash tower are approximately 60% non-Jewish, residents of the Summit, JSL's independent living community are approximately 30% non-Jewish, and residents of Wolk Manor, JSL's assisted living community approximately 70% non-Jewish. Development professionals from hospitals and senior living facilities convert appreciative patients and their families to repeat donors every day, regardless of the patient's faith and ethnicity, a concept that JSLF has yet to explore to its fullest.

MANY ORGANIZATIONS NEED DEVELOPMENT LEADERSHIP – WHY CHOOSE JSLF?

There is no shortage of worthy organizations that are looking for talented advancement/development leadership, but only JSL will provide you with the following compelling story to tell:

- JSL is the only Continuous Care Retirement Community in our region, providing our loved ones with all levels of service, including hard-to-find assisted living services for those who need specialized memory care.
- JSL is at the top of the list of most physicians and community-based referral sources in our community and was nationally ranked in 2017 by US News and World report in the top 15% of all nursing homes in the country.
- The organization offers the largest short-term rehabilitation services program in our region and is the only one that is accredited by CARF, an industry watch-dog.

- This position reports directly to the CEO of JSL, and is part of JSL’s senior management team. The successful candidate will enjoy the benefits of a CEO who understands, appreciates and participates in the fundraising program. Additional senior management team members are ready, willing and able to help further build the program.
- Both boards of directors are *highly engaged and well-connected*, donating on average 13% of all gifts versus a peer group average of 4%.
- The organization has a robust list of previously unsolicited, potential donors who have been personally impacted by JSL’s high quality programs and services.
- Everyone is impacted by one or more friends and family members who are struggling with physical, mental and/or social challenges presented with aging. A gift to JSLF may very well be a gift to one’s “future self.”
- As outlined in the JSL section at the beginning of this document, no other organization consistently invests in cutting edge resources, facilities and philosophies for our aging population. One only needs to take a tour of the new Green House Cottages to motivate a new or increased level of financial support. Donors can easily connect their gift with a vision for aging well in our community when they see it in action.

GOALS AND RESPONSIBILITIES

- Team with the JSLF board, staff, and the CEO of JSL to develop and execute a three-year action plan based on the recommendations from the aforementioned independent assessment report.
- Meet in-person with a minimum of five donors and/or prospects each week, bringing them on-campus when possible for a tour and to meet relevant senior staff members (depending on the donor/prospect’s area of interest).
- Define clear roles, responsibilities, and reporting relationships for each Foundation staff member.
- Prioritize the development and execution of a plan to significantly increase unrestricted annual gifts per year. Instill a culture of consistency where staff habitually adheres to new processes.
- Develop Key Performance Indicators (“KPI’s”) for each staff member and for the department (a department dashboard) and review regularly for progress against annual and long-term goals.
- Leverage existing technology to provide automated reports that support department, board, and senior management’s need for timely information (KPI’s, dashboard for example). Develop an expectation for 100% accuracy for entering all available data into Raiser’s Edge.
- Identify government and foundation grant opportunities that align with JSLF’s mission.
- Support the marketing team in the re-design of the Foundation website and assist in all efforts to keep marketing materials fresh and up-to-date.
- Regularly review monthly financial statements for accuracy and actionable insights.



- Mentor the capabilities of staff under management and provide access to training and development, with a goal of building a best-in-class, creative and accountable advancement operation.
- Strategize with the Senior Director of Major Gifts and the department heads of each service line at Jewish Senior *Life* within the first six months to develop a plan for engaging current and former clients and their families (for example, clients in transitional care, residents of the Summit, and so on).
- Team with colleagues to drive results from the organization's Life and Legacy planned giving program, applying existing knowledge of various planned giving tools and strategies in meetings with identified prospects.
- Proactively identify and manage an appropriate response to changes in organizational priorities and economic conditions as needed.
- As the "Face of JSLF," develop and deliver engaging, informative presentations for community and donor events, demonstrating industry expertise and showcasing the latest developments at JSL.
- Respond to ad hoc requests from colleagues, management, board members, donors, and prospects on a timely basis.
- While all services offered by Jewish Senior Life are open to individuals of all faiths and ethnicities, the successful candidate must have or gain a working knowledge of Jewish laws and traditions to maintain sensitivity to the organization's history.

CANDIDATE QUALIFICATIONS

The successful candidate will possess the following:

- Baccalaureate Degree in business, marketing, or a related degree; Master's Degree a plus.
- Five or more years of success as the leader of a foundation or not-for-profit fundraising/advancement team. Fundraising experience in the healthcare or senior services industries is a plus.
- Certification as a fundraising executive (CFRE credential) or other fundraising certification, or demonstrated adherence to the Association of Fundraising Professionals (AFP) code of ethics is preferred.
- A track record for developing efficient processes for fundraising, data management and report development, including the practice of holding staff accountable for habitually using data management systems like Raiser's Edge to their fullest capabilities.
- Experience as an individual contributor, during the course of normal career progression, with multiple facets of a sophisticated advancement organization, including annual giving, major gift solicitation, planned giving solicitation, corporate sponsorship, grant solicitation, giving societies/circles and event management.
- A reputation for mentoring and motivating staff to their fullest potential, including holding staff accountable for measurable results.



- Proven experience with developing and delivering engaging, content-rich presentations tailored for a wide variety of audiences – government, donors, volunteers, community groups, etc.
- Experience and knowledge of the local Jewish community is a plus.
- A natural inclination to “lead by example,” demonstrating flexibility, proactive problem identification and resolution, and a sense of urgency.
- Diplomacy, energy, innovation, and the ability to anticipate, prioritize and implement.
- Unquestioned professional and personal integrity.

This description is not meant to be an all-inclusive list of duties and responsibilities, but constitutes a general definition of position scope. Jewish Senior Life and the Jewish Senior Life Foundation prides itself on its diverse population of employees, patients and full-time residents, as belief in the Jewish faith is *not* a requirement of employment, services or residency.

HOW TO APPLY/MAKE INQUIRIES:

This retained search is being conducted exclusively by Patty Phillips of Clarity Recruiting and Career Management, Inc. for Jewish Senior Life. All applicants must contact Patty directly, as all applicants and inquiries, regardless of how sourced, will be forwarded to her attention.

If interested, please submit a cover letter and resume to: patty@clarityracm.com. In your cover letter, please explain the basis for your interest in the position and highlight relevant experience for the role.

JSLF VPD performance profile.doc