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**PERFORMANCE PROFILE FOR:**

**Director of Major Gifts**

**EMPLOYER:**

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



**Jewish Senior *Life*  
Foundation**

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**Jewish Senior *Life*: State-of-the-art facilities and sophisticated strategies that support a healthy, purpose-driven life for seniors in our community**

Jewish Senior *Life* ("JSL") is a \$63 million dollar, best-in-class organization, keenly focused on helping seniors lead healthy, vibrant lives in the Greater Rochester region. Jewish Senior *Life* recently completed a multi-year, \$83 million development project that set a new standard for high quality transitional and long-term care in the for decades to come. JSL recently celebrated the grand opening of three Green House® Cottages that house nine small scale self-contained 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 how to spend 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. Each resident has a private room and private bathroom and shares access to family-oriented common interior and exterior spaces, including a spacious kitchen designed for resident use, a family-style dining room and living room, and resident-directed patios and gardens. If that isn't exciting enough, the Farash Tower, JSL's six story long term care facility completed a comprehensive renovation in 2020, providing private rooms and modern amenities for all residents, whose care is governed by the aforementioned philosophy of resident-centered care.



**Services Provided by Jewish Senior *Life***

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 residential care for aging adults, JSL's Farash Tower also offers state-of-the-art outpatient rehabilitation services, memory care services, companion care for individuals requiring non-medical assistance in their homes (Living Well Companion Care), handyman services, meal delivery services, rehabilitation care for individuals who have traumatic brain injuries or neurologic impairments (Neurobehavioral Rehabilitation Program), 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 1000 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.



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**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 currently employs a motivated, engaged staff that achieves goals through a tiered approach to fundraising, including: major gifts, annual appeal, planned giving, stewardship and cultivation events, giving circles, foundation grant appeals and occasional opportunities for government grants. From 2013 to 2018 the Foundation 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.

Over the years, diligent efforts on the part of the Foundation's staff, Board of Directors and volunteers has raised an endowment of approximately \$45 million to support the mission of Jewish Senior *Life*, significantly larger than the endowment of comparable organizations.

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**THE OPPORTUNITY – develop transformational relationships that ensure JSL's existence for the benefit of future generations.**

The JSL/JSLF senior leadership team is seeking a dynamic Director of Major Gifts to focus efforts on building relationships with existing and new donors who have the capacity to make substantial gifts to the organization. **This position is available due to the promotion of the prior Director of Major Gifts.** Success will be achieved by hiring an individual who possesses a powerful drive to leverage relationship development skills to identify and match the long-term philanthropic goals of donors with the investments required to age well in our community. The successful candidate will have a wealth of examples of cultivating individual gifts of \$25,000 or more through diligent, creative long-term relationship development efforts. Previous annual appeal and fundraising event success won't be enough to get the job done and is not the focus of this role.

For the past several years, the Foundation's annual fundraising results have remained relatively flat, not counting the tremendous results of the aforementioned Power of One campaign. The Director of Major Gifts will first need to focus effort on creating and executing a comprehensive major gift and planned giving annual work plan that supports the Foundation's long-term strategic goals. The Director's efforts will be fully supported by the foundational work being done by the board of directors and senior leadership to create a culture of philanthropy at JSL. The Director of Major Gifts will contribute to this culture of philanthropy by constantly scanning the JSL environment for inspirational resident/client success stories and sharing those stories with fellow employees, current donors, and prospects. The DOMG will be the key player in building donor loyalty through the consistent execution of high-quality cultivation, solicitation, and stewardship practices.

The successful candidate should be equally attracted to the prospect of reaching out to an entirely new, undeveloped list of potential donors in several targeted categories. Jewish Senior Life's Transitional Care Unit, designed to rehabilitate post-surgery or post-acute illness patients back to their own homes, is considered to be the one of the best in our community. Appreciative patients of this program, combined with appreciative residents and family members of JSL's senior communities, have not been fully cultivated to-date by a talented major gifts professional who understands the power of a "grateful patient" program. Senior leadership of JSL/JSLF are currently developing a "JSL Gratitude Program," the cornerstone of which is an organization-wide training program so all employees understand the power of their role in donor development. As a result, the successful DOMG will find a high degree of institutional support for this emerging strategy.

Non-Jewish residents and their families represent another undeveloped target prospect pool for the next Director of Major Gifts. Residents of the Cottages and the 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 are approximately 70% non-Jewish. Development professionals employed by hospital foundations successfully cultivate relationships and gifts from appreciative patients and their families every day, regardless of the patient's faith and ethnicity, a concept that JSLF has yet to explore to its fullest.

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## **THERE ARE MANY OPEN DEVELOPMENT ROLES OUT THERE – WHY JOIN JSL??**

**If you crave the ability to contribute to a growing organization with a mission that impacts our community positively and deeply, you have found your home. If you are fatigued with working for organizations who expect advancement miracles but who provide no strategic pathway or means of support to get there, you have found your home. The successful candidate at JSLF will have an amazing story to tell; one only needs to take a donor on 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.**

**The time is now to join this exciting team. The Raiser's Edge donor database has been scrubbed, the board is executing a strategy to become better ambassadors, the website has been beautifully re-designed, the organization's first-ever advertising campaign has gained traction, legacy donors are energized by the visual results of their campaign gifts and are poised to support the organization's future, and undeveloped targeted prospects are plentiful.**

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## **GOALS AND RESPONSIBILITIES**

- Team with the Executive Director and Foundation staff to meet legacy donors and board members within the first three months.
- Within the first six months, utilize data and insights from colleagues and senior leadership to develop a cultivation plan for various targeted groups of new donor prospects.

- Meet in-person with an average of eight donors and/or prospects each week and manage/steward a portfolio of approximately 120 donors.
- Enter donor contact notes and next steps in the cultivation process for each donor/prospect interaction into Raiser's Edge NXT. Develop and follow a tracking system that will instill a culture of accountability for planned actions and results on the part of all parties involved.
- Mentor and be open to mentoring from fellow advancement colleagues, with a goal of building a best-in-class, creative and accountable advancement operation.
- Strategize with the Executive Director and department heads of each service line at Jewish Senior *Life* within the first six months to execute the JSL Gratitude Program. 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 planned giving strategy, applying existing knowledge of various planned giving tools and strategies in meetings with identified prospects.
- Take the lead on providing qualitative and quantitative reporting of the Foundation Team's efforts to the Foundation's Board of Directors.
- Proactively identify and manage an appropriate response to changes in organizational priorities and economic conditions as needed.
- Represent JSL and JSLF at a variety of donor and community events with professionalism, demonstrating industry expertise and a bias for action in response to ad hoc questions and concerns. Representation will sometimes require the creation and delivery of high-energy presentations.
- Respond to ad hoc requests from colleagues, management, board members, donors, and prospects on a timely basis.
- Team with marketing and advancement colleagues to keep marketing collateral and website fresh, responsive and accurate.
- 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 Judaism, Jewish laws and traditions to maintain sensitivity to the organization's history.

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## CANDIDATE QUALIFICATIONS

### The successful candidate will possess the following:

- Baccalaureate Degree in marketing, communications, business or a related degree; Master's Degree a plus.
- Five or more years of success as a major gifts officer including lead donor cultivation responsibilities and in-person solicitation. Experience with all facets of an advancement organization is preferred, including annual appeals, event management, planned giving, grant solicitation, and giving societies/circles. Individuals who instead possess significant consultative sales and relationship management success outside of the field of advancement/fundraising will be considered.
- Experience using Raiser's Edge NXT donor management system is a plus.

- Examples of creative ways of connecting, maintaining and deepening relationships with existing and prospective donors.
- Proven experience with developing and delivering content-rich presentations tailored for a wide variety of audiences – donors, volunteers, community groups, government, etc.
- Experience and knowledge of the local Jewish community is a plus.
- A natural inclination to “lead by example,” demonstrating flexibility, respect for residents, families and colleagues, proactive problem identification and resolution, and a sense of urgency.
- A reputation for diplomacy, treating others with respect, and empathy with individuals from all cultures and socio-economic backgrounds
- 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 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.

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#### 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](mailto:patty@clarityracm.com). In your cover letter, please explain the basis for your interest in the position and highlight relevant experience for the role.

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