**I&P Office, Budget & Job Descriptions TEMPLATE**

= current ; next hire = ; phase 2 hire = 



Estimated Budget

|  |  |  | **Y1** | **Y2** | **Y3** |
| --- | --- | --- | --- | --- | --- |
|  |
|  |
| **Expenses** | | |  |  |  |  |
|  | **Salaries** | |  |  |  |  |
|  |  | Director, Investments & Partnerships | 200,000 | 225,000 | 250,000 |  |
|  |  | Ass't Director, Investments & Partnerships | 105,000 | 115,000 | 125,000 |  |
|  |  | Coordinator | 65,000 | 68,000 | 72,000 |  |
|  |  | Taxes & Benefits | 92,500 | 102,000 | 111,750 |  |
|  | *Salaries and Benefits subtotal* | | 462,500 | 501,000 | 558,750 |  |
|  |  |  |  |  |  |  |
|  | **Professional Services** | |  |  |  |  |
|  |  | Grant writing | 20,000 | 22,000 | 24,200 |  |
|  |  | Prospect Screening | 5,000 | 5,500 | 6,050 |  |
|  |  | Professional Development | 6,500 | 7,000 | 7,500 |  |
|  | *Professional Services subtotal* | | 31,500 | 34,500 | 37,750 |  |
|  |  |  |  |  |  |  |
|  | **Operations** | | - | - | - |  |
|  |  | Travel and Parking | 1,250 | 1,375 | 1,513 |  |
|  |  | Meals | 3,000 | 3,060 | 3,121 |  |
|  | *Operations subtotal* | | 4,250 | 4,435 | 4,634 |  |
| **Total Expenses** | | | 498,520 | 539,935 | 601,134 |  |

# JOB ANNOUNCEMENT: Director, Investments & Partnerships

# *[Full Time, Exempt]*

Do you want to make a positive difference in [mission]? Do you want to join a high-performing team of dedicated professionals who work effectively together, have fun, and share the joy of truly making the word a better place?

[organization] is [mission, vision, history].

[organization], one of the nation’s most respected and successful non-profit agencies, seeks outstanding candidates for this important leadership position to advance its work to provide innovative, progressive housing and support to help people achieve and sustain independence.

The Director of Investments and Partnerships will serve as a leading spokesperson and ambassador for [organization]. S/he is primarily responsible for establishing and maintaining relationships with a portfolio of community leaders and individuals who are prospective partners and investors in [organization]’s work. S/he will cultivate these relationships and take the leadership role to develop a team of dedicated professionals to engage individuals and corporations across the state and solicit their investment of time, talent and financial support in [organization]’s mission.

Specifically, this position will initiate contacts with potential investors of $25,000 and above; develop and deploy individualized cultivation strategies which harness the full range of [organization]’s people and programs; develop solicitation and closure strategies; and deliver ongoing, and personal reporting regarding any and all investments made.

**Major Responsibilities:**

1. In close partnership with the Chief Executive Officer, coordinates the development and revision of the organization’s business plan, including articulating organization-wide goals; strategies; milestones; metrics; financial strategy; and staffing & budget projections.
2. Works closely with the Chief Executive Officer to engage the Board of Directors to capture their input and feedback on the business plan, and capture feedback and direction around financial projections and the metrics provided in the executive dashboard.
3. Shares the Agency’s business plan and other key organizational documents with key stakeholders across the state for their advice and feedback.
4. Serves as a liaison in support of the outreach, advocacy and relationship building efforts of the Board of Directors and the Executive Director to a carefully identified set of influential leaders in the philanthropy, corporate leadership, government, nonprofit, and community leadership and advocacy spaces.
5. Directly oversees a portfolio of approximately 150 current and prospective financial supporters. Ensures that each individual in the portfolio receives continuous, personalized attention and ongoing engagement in furtherance of that individual’s relationship with and support of [organization]. On average, conducts a minimum of one and a optimum of three personal contacts with current and prospective supporters each business day.
6. Ensures direct, efficient, responsive and personalized support for each [organization] Board Member to support that Board Members work to establish and build strong and productive relationships with current and prospective partners and investors.
7. Oversees the operation of the Office of Investments & Partnerships, including the work of the Assistant Directors, foundation and corporate relations staff, coordinator and support staff, vendors and contractors, and others involved with marketing, communication, and outreach.
8. Ensures that every financial supporter receives personalized, face-to-face follow up reports that explains the use of the funding and the benefits created. Before these reports are generated, each individual will be consulted on the means of reporting that are most suitable and helpful for each.
9. Ensures that database protocols and procedures are comprehensive, best practice, and executed with discipline and accuracy. Ensure the donor database is continuously updated so that all information is accurate, up-to-date, and appropriately organized.
10. Oversees the production and distribution of projections and results to ensure the organization is on track to meet goals.
11. Statement of Ethics – takes lead responsibility to ensure that each member of the Investments and Partnerships Office, the CEO, and all members of the Board of Directors read and discuss, at minimum once annually, the [AFP Code of Ethics](https://afpglobal.org/sites/default/files/attachments/2018-10/CodeofEthics.pdf) and ensure that each individual engages with the concepts and adheres closely to these principles and practices.
12. Leads the development and implementation of development office planning efforts, including policies and procedures, and implementation of goals.

Requirements:

* Exceptional interpersonal, written and oral communication skills
* Demonstrated record of successful team building and staff supervision
* Record of outstanding academic achievement
* Highly tuned listening skills
* Confidence, professionalism, and passion for the mission to provide progressive housing and support to help people achieve and sustain independence.
* Strong empathy & perseverance; highest ethical standards; optimistic, positive and charismatic disposition

Qualifications:

* College Degree; advanced degree preferred
* 3+ years’ experience with nonprofit leadership, board governance, individual and corporate fundraising, business strategy, team building, organizational development and performance enhancement.

Reports to: Executive Director

Compensation:

$150K plus full benefits to start. Rapid promotion with performance pay increases and responsibility will come quickly to the right individual, as soon as year one, with potential pay exceeding $250K.

# JOB ANNOUNCEMENT: Assistant Director, Investments & Partnerships

# *[Full Time, Exempt]*

Do you want to make a positive difference in [mission]? Do you want to join a high-performing team of dedicated professionals who work effectively together, have fun, and share the joy of truly making the word a better place?

[organization] is a [mission, vision, history].

Our program results prove that we are one of the most effective nonprofits of our kind in the United States. A big reason why is because our staff support each other in a culture of teamwork, mutual caring and support, and dedication to our mission.

While we have much to celebrate, our work is far from done. [organization] is now preparing for an ambitious expansion of our programs and services. This new position is one that will be essential for our success as we seek to generate increasing levels of community partnership and investment in our mission from individuals, foundations, corporations, and local, state and federal agencies.

The ideal candidate will be a results-driven, team- and detail-oriented professional who is comfortable working on multiple tasks in a deadline-oriented environment. While no nonprofit or fund raising experience is required, prior experience in nonprofit administration or development is a plus.

**Purpose:**

* Responsible for providing daily administration and support to organization’s income generation efforts from individuals and corporations. Position will have significant visibility to foundation grants, agency contracts and earned income opportunity.
* The position has substantial internal management responsibilities as well as significant interaction with the Board of Trustees, senior management, other staff, and the general public.
* Position is responsible for managing a portfolio of approximately 150 individuals and engaging them in the work and mission of the organization to solicit their time, talent and expertise. Secondary responsibilities include donor database administration; efficient and accurate management of data; planning and organizing; team building; and general administrative support.

**Major Responsibilities:**

1. Shares the Agency’s goals and strategies to key stakeholders across the state for their advice and feedback.
2. Serves as a liaison in support of the outreach, advocacy and relationship building efforts of the Board of Directors and the Executive Director to a carefully identified set of influential leaders in the philanthropy, corporate leadership, government, nonprofit, and community leadership and advocacy spaces.
3. Directly oversees a portfolio of approximately 150 current and prospective financial supporters. Ensures that each individual in the portfolio receives continuous, personalized attention and ongoing engagement in furtherance of that individual’s relationship with and support of [organization]. On average, conducts a minimum of one and a optimum of three personal contacts with current and prospective supporters each business day.
4. Provides direct, efficient, responsive and personalized support for each [organization] Board Member to support that Board Members work to establish and build strong and productive relationships with current and prospective partners and investors.
5. Ensures that each financial supporter receives personalized, face-to-face follow up reports that explains the use of the funding and the benefits created. Before these reports are generated, each individual will be consulted on the means of reporting that are most suitable and helpful for each.
6. Ensures that each contact report with a current and prospective investor is entered according to office policy and procedures no later than 24 hours after occurrence.
7. Ensures the donor database to is continuously updated with accurate, appropriately organized information.
8. Conducts the production, distribution and analysis of bi-weekly and monthly pipeline reports that summarize the current relationship stage and activity levels with all current and prospective partners and supporters: individuals, foundations, corporations, government agencies and impact investors.
9. Statement of Ethics –helps ensure that each member of the Investments and Partnerships Office, the CEO, and all members of the Board of Directors read and discuss, at minimum once annually, the [AFP Code of Ethics](https://afpglobal.org/sites/default/files/attachments/2018-10/CodeofEthics.pdf) and ensure that each individual engages with the concepts and adheres closely to these principles and practices.
10. Gift Processing – ensures that everyone who provides a donation of time, financial or in-kind resources receives a personalized acknowledgment and gift receipt within three business days; ensures that all checks, cash or other financial instruments are processed in a manner that reflects best practices around financial controls, book keeping and accounting. Support the monthly reconciliation process with all appropriate follow-up detail.
11. Leads the development and implementation of development office planning efforts, including policies and procedures, and implementation of goals.
12. Other duties as assigned.

**Qualifications:**

* Bachelor’s Degree in a related field
* CRM database experience preferred
* Proficient in Microsoft Office suite
* High level of organizational skills and ability to prioritize and manage multiple projects simultaneously
* Excellent written and verbal communication skills
* Ability and desire to work as part of team; identify with and support the mission of [organization]
* A commitment to the values of [organization]: Professionalism, Integrity, Compassion and Initiative

**Reports to**: Manager, Investments & Partnerships

**Compensation:**

$75K with generous benefits to start, with performance based pay increases with total potential pay exceeding $100K.

# JOB ANNOUNCEMENT: Investment & Partnership Coordinator

# *[Full Time, Exempt]*

Do you want to make a positive difference in [mission]? Do you want to join a high-performing team of dedicated professionals who work effectively together, have fun, and share the joy of truly making the word a better place?

[organization] is a [mission, vision, history].

While we have much to celebrate, our work is far from done. [organization] is now preparing for an ambitious expansion of our programs and services. This new position is one that will be essential for our success as we seek to generate increasing levels of community partnership and investment in our mission from individuals, foundations, corporations, and local, state and federal agencies.

The ideal candidate will be a results-driven, team- and detail-oriented professional who is comfortable working on multiple tasks in a deadline-oriented environment. While no nonprofit or fund raising experience is required, prior experience in nonprofit administration or development is a plus.

**Purpose:**

* Responsible for providing daily administration and support to organization’s income generation efforts from individuals, foundations, government agencies, and corporations, as well as earned income strategies.
* The position has extensive internal management responsibilities as well as significant interaction with the Board of Trustees, senior management, other staff, and the general public.
* Position provides primary administrative support on many aspects of managing the organization’s business enterprises, including donor database administration, data entry, gift processing, planning and organizing, information management, report preparation, meeting scheduling, travel, and related tasks.
* Position is responsible for working with partners and vendors to plan, develop and execute donor and volunteer cultivation and recognition events.

**Major Responsibilities:**

1. Receives and routes inquiries from external donors, partners, and other funders; represents the organization on the phone and at public events.
2. Responsible for donor data entry, all donor acknowledgements, reporting, and tracking of gifts.
3. Assures database information is accurate; works with business staff to reconcile gift accounting; prepares deposits and transactions and supports related financial processes.
4. General administrative support, including receiving and routing calls and inquiries, scheduling appointments and meetings, provides meeting support by distributing meeting packets, compiling attendance, taking meeting notes, and supporting the work of the Board of Trustees and management staff
5. Maintain business files and records and establish/maintain effective systems for same; organizes meeting minutes, financial records, purchase orders, and grant files.
6. Assists with production and distribution of all communication and marketing materials; engages all aspects of the organization’s business enterprise as necessary.
7. Serves as a resource for the organization, acting as a liaison between senior management and key external constituencies such as the Board of Trustees, other volunteers, funders, and community partners.
8. Works with volunteers and external vendors to manage and execute volunteer and donor recognition events and community wide celebrations.
9. Participates in the development and implementation of development office planning efforts, including policies and procedures, and implementation of goals.
10. Other duties as assigned to assure successful operations.

**Qualifications:**

* Bachelor’s Degree in a related field
* CRM database experience preferred
* Proficient in Microsoft Office suite
* High level of organizational skills and ability to prioritize and manage multiple projects simultaneously
* Excellent written and verbal communication skills
* Ability and desire to work as part of team; identify with and support the mission of [organization]
* A commitment to the values of [organization]: Professionalism, Integrity, Compassion and Initiative

**Reports to**: Manager, Investments & Partnerships

**Compensation:**

This is an entry-level position in a professional team. The role begins with $50K annually with generous benefits to start. Position provides the potential for advancement and direct participation in all aspects of the Investment & Partnership team.