

Position Title	Chief Advancement Officer
Reports To	President/CEO
Grade	30
Supervisory	Yes
FLSA	Exempt (E)
Effective/Revised	March 2025

Position Summary

A Chief Advancement Officer (CAO) is a senior-level executive responsible for developing and executing a comprehensive fundraising strategy for an organization, including identifying potential donors, cultivating relationships, soliciting major gifts, managing annual giving campaigns, and overseeing all aspects of communications and marketing to promote the organization's mission and secure donor (financial) support; essentially leading all efforts to raise significant funds for the Foundation's operations and initiatives. The CAO provides strategic leadership by articulating philanthropic needs and plans to the executive management team, staff, donors and the board of directors.

Essential Functions

Daily attendance and punctuality are an important responsibility of all Immokalee Foundation employees and therefore considered an essential function for all positions.

- **Strategic Planning:**
 - Develop and implement a long-term advancement strategy aligned with the Foundation's overall goals and strategic plan, including identifying key donor segments, fundraising priorities, and revenue targets.
 - Establish benchmarks to measure strategic plan success i.e. fundraising, donor pipeline, planned gifts, and major gifts.
 - Ensure the fundraising plan goals meet the overall strategic plan objectives and benchmarks.
- **Major Gift Cultivation:**
 - Identify, cultivate, and solicit high-net-worth individuals for significant donations through personalized engagement and relationship building.
 - Cultivation major gift donors for capital campaigns.
 - Establish multi-year campaign goals of permanently or temporarily restricted funds.
- **Annual Giving Programs:**
 - Oversee the development and execution of annual fundraising campaigns, including direct mail, online giving, networking, and events.
 - Enhance the fundraising pipeline to increase ongoing support. Maintain a dynamic portfolio of high-net-worth individuals.
 - Increase year-over-year fundraising income.
- **Planned Giving Programs:**
 - Lead strategies that encourage planned gifts, e.g. bequests and charitable trusts.
 - Strengthen the Foundation's long-term sustainability through endowment giving, legacy gifts, and other long-term charitable commitments to the Foundation.
- **Corporate and Foundation Relations:** Build relationships with corporations and foundations to secure grant funding.
- **Donor Stewardship:** Manage ongoing communication and engagement with donors to express gratitude and maintain long-term relationships.
- **Team Leadership:** Lead a team of advancement professionals, including development officers and event coordinators.
- **Communication and Marketing:** Collaborate on the development of marketing materials, publications, and communications strategies to promote the Foundation's mission and fundraising efforts.
- **Board Relations:** Collaborate closely with the Board of Directors to inform them about fundraising progress and secure their support for advancement initiatives.

Non-Essential Functions and Duties

- Ability and willingness to delegate effectively and hold self and others accountable.
- Model the use of integrity and diplomacy in making decisions regarding sensitive issues.

- Demonstrate a commitment to quality and service excellence.
- Additional duties as assigned.

Supervisory Responsibilities:

Supervise and lead a team of employees in carrying out their assigned duties and the day-to-day operational functions department:

- Ensure employees produce accurate and correct quality of work.
- Review program compliance to identify and mitigate operational risk and to ensure ongoing adherence with compliance procedures.
- Be knowledgeable about all Foundation programs, how they interact, and their inter-dependency with each other.
- Ensure that all security procedures are strictly followed.
- Collaborate in the hiring, training and retention of staff. Train employees to develop their skills.
- Supervise and develop staff regarding service expectations, policies, procedures, and Foundation programs.
- Disseminate appropriate Foundation information to staff and discuss operational issues with appropriate members of management.
- Evaluate employee performance through performance reviews and constructive feedback.
- Maintain staff schedules to always provide adequate coverage.
- Effectively manage difficult situations with vendors, staff, board and donors, providing them with acceptable resolutions within an acceptable time frame.
- Maintain the highest level of confidentiality with all information obtained.
- Act as backup for others as assigned.
- Comply with all company policies, procedures and regulations.

Core Competencies

- Adaptability - responding to change effectively, proactively seeking opportunities to be supportive of change and serve our mission.
- Collaboration – helping colleagues as needed and viewing responsibilities as shared.
- Communication – effectively using oral and written communication to both internal and external parties. Demonstrating empathy and listening.
- Mission Driven – commitment to the mission of the Foundation and alignment with organizational values.
- Ownership – effectively manages own work and work of teams ensuring delivery of high-quality work.

Leadership Competencies

- Deals with Uncertainty – identifying and assessing potential risks of a situation and acts accordingly to mitigate them.
- Develops and Motivates Others – motivating and supporting departments through coaching and mentoring.
- Manages with Data – understanding data and identifying insights and implications.
- Strategic Thinking – considering the future of the Foundation proactively and responsively, identifies innovative opportunities and weighs diverse inputs to form strategies.
- Values and Prioritizes Inclusivity – consistently sees, learns from and takes strategic action related to diverse perspectives. Demonstration of self-awareness and behaviors to work with others respectfully and effectively.

QUALIFICATIONS

Education

- Bachelor's degree required in the field of business management, marketing, public policy, education, or related field of study.
- Master's degree preferred.

Certification(s)/Licenses

- CFRE or CFRM, or attainment eligible and expected within one year of employment.
- Active valid driver's license in good standing.

Experience

- Minimum 10 years of professional experience in fundraising development, marketing/communication management preferably in a not-for-profit environment.
- Minimum five years of director level experience in fundraising development and establishing strategy with high-net-worth donor communities.
- Demonstrated diversification in philanthropic practice areas required.
- Previous direct working and collaborative experience with not-for-profit boards.

- Previously demonstrated management experience fostering and developing an organizational culture that supports intra-organizational teamwork and collaboration which supports employee engagement and strategic and operational goal attainment.

Skills and Abilities

- Excellent verbal and written communication skills.
- Excellent interpersonal and conflict resolutions skills.
- Excellent organizational skills and attention to detail.
- Advanced analytical and problem-solving skills.
- Advanced application of social etiquette standards and manners.
- Advanced knowledge and experience with varied third-party systems, e.g. Blackbaud, Raisers Edge, iWave, Wealth Engine.
- Intermediate to advanced proficiency with Microsoft Office Suite or related software.
- Advanced knowledge and proficiency in the fundraising techniques with high-net-worth donors.
- Advanced proficiency in the translation of vision, mission, and strategic direction into specific projects and initiatives.

Physical Abilities/Working Conditions

- Office environment and social settings.
- Frequent and prolonged periods of viewing and operating a computer.
- Occasional lifting up to 25 pounds.
- Occasional standing for long periods of time.
- Occasional daily or overnight travel.
- Ability to operate a motor vehicle and adhere to traffic laws and regulations.

Salary Range

- \$150,000-\$170,000 commensurate with experience.

Preference is given to Southwest Florida residents

Employee Acknowledgement

I am able to perform the essential functions of this job with or without reasonable accommodation.

Print Name		Signature		Date	
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