

LEADERSHIP PROFILE



Senior Vice President and Managing Director
Atlanta Jewish Foundation
Atlanta, Georgia

"We have a big opportunity to connect more Atlanta Jews with the values and power of the Jewish community to improve the world through philanthropy, and Atlanta Jewish Foundation is central to that."

Eric M. Robbins, CEO, Jewish Federation of Greater Atlanta

THE OPPORTUNITY



The Jewish Federation of Greater Atlanta is a philanthropic champion, connecting metro Atlanta area Jews of all ages, backgrounds and perspectives to the values and power of the Jewish community to improve the world. Currently, Atlanta Jewish Foundation manages \$311 million in total assets, generating more than \$30 million in annual philanthropic support.

This is a time of renaissance for the Atlanta Jewish Foundation. The Foundation is the centerpiece of Federation's goal to revitalize philanthropy and serve as philanthropic champion for Atlanta's Jewish community. The newly created position of SVP and Managing Director has an exciting mandate: to lead the Foundation in defining goals and strategies, building current and new relationships, innovating, transforming and growing. A multi-year grant is in place to support this transformation.

The new Managing Director (MD) will be a magnetic leader with vision, relationship skills and passion for mission impact. The MD will take the Atlanta Jewish Foundation to its next level of strength, vitality and visibility, and will play a significant role in the future of Federation



and the community. Partnering with CEO Eric Robbins, staff and lay leadership, the MD will drive a vision of integrated philanthropy in which the annual campaign, planned giving and endowment are centrally convened and enhanced across Federation.

The MD will build relationships, engagement and visibility in the community. Under the MD's leadership, the Foundation will increase philanthropy and assets significantly over time, benefitting the Jewish community and communities in need.



THE ORGANIZATION

The Jewish Federation of Greater Atlanta is a source of community connection and impact.

Founded in 1906, Federation partners with donors, organizations, financial advisors and foundations to address pressing issues facing the community and to develop innovative strategies that create deep and lasting impact locally, in Israel and around the world.

Atlanta Jewish Foundation's central role within Federation was reinforced during Federation's visioning initiative. Over 175 diverse individuals met to discuss community issues, possibilities and vision for the future. The initiative resulted in five focus areas: inspiring more Jewish journeys; rising up higher to strengthen ourselves and our world; making more Jewish places; moving to global Jewish peoplehood; and creating radically welcoming spaces.

As the community's philanthropic champion, Federation will serve as an incubator, nourishing new initiatives; an amplifier of community impact; a wayfinder, linking people to services, resources and events; and a source of community intelligence. Aspirations for Atlanta Jewish Foundation include:

- Higher visibility, branding and top-of-mind presence
- A compelling value proposition that drives a seat at the table early in the wealth planning process, and
- Growth in planned, endowment, unrestricted and donor-advised philanthropy.

Donors choose Atlanta Jewish Foundation for their philanthropic needs because it uniquely offers:

- Expertise on the needs of the Atlanta Jewish Community
- The satisfaction of knowing that fees contribute to the mission of strengthening our Jewish community, and
- Proficiency in financial management, including pre-sale gifts of real estate, business interests and other complex assets.

To engage, care for, connect, and strengthen our Greater Atlanta Jewish Community for the benefit of the Jewish people.

Jewish Federation of Greater Atlanta mission statement

Atlanta Jewish Foundation manages nearly 440 Donor-Advised Funds, eight supporting foundations and over 200 restricted and custodial funds that, when combined with the unrestricted endowment fund, total \$311 million. Atlanta Jewish Foundation facilitates multiple forms of philanthropy and donor-recommended giving through and to the Jewish and broader communities.

In 2018, Foundation donors directed close to \$31 million in grants to 954 nonprofit organizations.



For more about Jewish Federation of Greater Atlanta and the Atlanta Jewish Foundation , go to www.jewishatlanta.org.

THE RESPONSIBILITIES

The SVP and Managing Director (MD) will be a dynamic leader with experience relevant to foundations, philanthropy and wealth management. Reporting to the Federation CEO, the MD will lead the Foundation and its direction, team, outreach, business and growth. Responsibilities include relationship building, oversight of the Foundation, attracting planned and complex gifts, and developing and maintaining the Foundation's philanthropic advisory suite of products and services.

A leader of people, ideas and results, the MD will have the skills and drive to take the Foundation to new levels of visibility, saliency, effectiveness and excellence, and will have passion for this mission and the Jewish community. The Managing Director will:

1. **Lead the Foundation.** The Managing Director will be a forward-thinking, compelling leader able to develop a comprehensive plan and to project vision, inspire engagement and lead implementation. The MD will be

knowledgeable of philanthropy, foundations and wealth management. The MD will be a driving force for passion, engagement and growth.

2. **Grow visibility and audiences.** The Managing Director will be a magnetic presence, communicator and public face, representing the Foundation with wealth and financial advisors, partners, current and potential donors. The Managing Director will position, market and promote the Foundation in new ways, bringing opportunities to life for current and new audiences.
3. **Build relationships and an advisory practice.** The Managing Director will be out in the community, engaging effectively in ways that deepen connection and commitment. The MD will be an entrepreneurial builder of the Foundation's philanthropic advisory practice and a trusted advisor, personally partnering with donors.
4. **Captain a great team.** The MD will be an upbeat team leader who is a player-coach, passionate about building a high-performing Foundation team. The MD will model best practices, collaboration and effective engagement. The MD will be a valued partner across Federation and the community, and an expert leader of the business of the Foundation.
5. **Grow resources.** Through authentic relationship building and quality of relationships across the Jewish community, combined with knowledge of complex financial vehicles and community solutions, the MD will attract more people and more investment, resulting in significant growth.
6. **Lead forward-looking strategy and a new business model.** The MD will be a strategic leader in a changing communal and philanthropic landscape, with the insight and courage to leverage emerging trends, opportunities and best practices. The MD will be visionary about audiences and growth, with good judgment and the acumen to evolve the Foundation business model and lead achievement of ambitious objectives.



EXPERIENCE AND PERSONAL CHARACTERISTICS

The ideal candidate will be a leader with experience in the worlds of wealth management, philanthropy, foundations and the Jewish community. Preferred backgrounds include executive-level experience in: professional services, wealth management, financial and/or other advisory business; major gifts or planned giving fundraising; and/or work in or closely with a philanthropic foundation. Passion for the mission and work of the Jewish Federation is essential.

Personal assets being sought include:

- Energetic, positive leadership that inspires staff, donors, partners and members of the community.
- A combination of vision, action orientation and tenacity.
- A mindset of learning, moving forward and continually improving.
- Ability to persuade and influence.
- High emotional intelligence and relationship building skills.
- Open-mindedness, and a penchant to innovate and take strategic risks.
- Drive for the mission, coupled with low personal ego.
- Business, philanthropic and financial savvy.
- Ability to build teams and work collaboratively in a goal oriented environment that includes professional and lay leaders.
- A talent for donor relations and working with volunteers.
- Knowledge of best practices in philanthropy and complex financial vehicles including planned giving and donor-advised funds.
- A sense of humor.
- Ability to build a positive, collaborate culture of success.

THE RELATIONSHIPS

The SVP and Managing Director reports to Federation President and CEO Eric Robbins. Direct reports include a financial manager, a Foundation Relations Coordinator and one or more professionals to be hired. The MD collaborates with team members across the organization.

THE LOCATION

The position is located at the Jewish Federation of Greater Atlanta offices in midtown Atlanta.

For potential consideration or to suggest a prospect, please email
AtlantaJewishFoundation@boardwalkconsulting.com

or call

Kathy Bremer or Laura Lovelace at 404-BoardWalk (404-262-7392).

For the current status of this and other searches, please visit
www.boardwalkconsulting.com.
