

## JOB DESCRIPTION

Job Title: Chief Advancement Officer  
FLSA Status: Exempt  
Department: Philanthropy

Status: Full-Time  
Reports to: President & CEO  
Revision Date: 4/25/2023

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### POSITION SUMMARY:

This position supports the work of the Y, a leading nonprofit, charitable organization committed to strengthening the community through youth development, healthy living, and social responsibility. The Chief Advancement Officer at YMCA of Southwest Florida stewards the Y's cause, promoting and protecting the brand and reputation as a global, inclusive organization within the community.

Reporting to the president & CEO, the Chief Advancement Officer will be responsible for crafting the overall strategic direction for financial development, providing strong leadership for major gifts, capital campaigns, endowment, and donor relationships. The Chief Advancement Officer will lead and oversee all fundraising activities, particularly within the foundation community, corporate giving sources, individuals with a significant capacity to make a difference, and other untapped areas.

### ESSENTIAL FUNCTIONS:

- Creates and implements the master plan of fundraising to match organizational needs and to ensure continued growth in giving year over year including capital campaigns, annual major gifts, and endowment & planned giving.
- Determines fundable projects and programs with the CEO and staff and packages them appropriately for consideration of individual donors and foundations.
- Develops and monitors annual development plan and budget and achieves personal and departmental performance goals for fundraising.
- Directs all public relations related to organizational philanthropic efforts.
- Maintains research on foundations, creates proposal timelines, oversees grants, and maintains all reporting and stewardship as appropriate.
- Works with CEO, Board members, and volunteers to identify, cultivate and solicit individuals, foundations, corporations, and other organizational sources of major gift support relevant to top-priority needs. Identifies and manages a portfolio of 75-100 prospective major gift donors.
- Maintains regular communications with prospects and donors via stewardship program and monitors lapsed donors to create initiatives to maintain continued relationships.
- Provides oversight and support to the Advancement Committee of the Board. Attends Board meetings and provides summarized reports of successes and challenges.
- Participates actively on relevant committees and at external speaking engagements, conference panels, and training to advance the YMCA of Southwest Florida's Mission & Vision.
- Responsible for developing the principles for capital development and supporting Senior Staff in the completion of the planned fundraising objectives.

- Responsible for the performance and management of the endowment and planned giving programs, and with the Finance Department and CEO, monitoring the performance of endowment investments and the disbursement of earnings.
- Provides training and opportunities for involvement in the fundraising program for the Board of Directors, Foundation, and Community Boards.
- Maintains expert knowledge of specific charitable giving vehicles including but not limited to current IRS Estate Tax Codes, Charitable Gift Annuities, Charitable Remainder Trusts, Donor Advised Funds, and Endowments.
- Promotes and practices the YMCA mission and values and follows all policies and procedures of the organization.
- Evaluates fundraising programs, special events, and campaigns to ensure that the desired return on investment is achieved.
- Responsible for all data management and reporting related to development, ensuring exemplary stewardship by the Y.
- Supports Branch Executive Directors in delivering consistent practices with Branch Community Boards and training Branch Community Board volunteers.
- Serves as the YMCA's liaison to the United Way, the National Association for YMCA Development Officers (NAYDO), and other critical partners.
- Supervises departmental staff and independent contractors.

### **Secondary Responsibilities:**

*Every incidental duty connected with the Chief Advancement Officer job cannot be specified in the position description and the colleague, at the discretion of the Chief Executive Officer, may be required to perform duties that are not included in this job description.*

### **QUALIFICATIONS:**

- An undergraduate degree is required, with an advanced degree preferred.
- 5+ years of experience leading annual funds, capital, endowment, and/or similar campaigns is preferred.
- 7+ years of experience in roles of increasing responsibility in nonprofit fundraising.
- Experience researching, identifying, nurturing, and engaging external partners that align with the organization's objectives. A broad-based development background encompassing public, foundation, and corporate grants; major gifts; planned giving; capital development; sponsorships; endowment; and annual funds from diverse sources.
- Must possess a demonstrated record of personal success in raising significant gifts (i.e., successful six/seven-figure asks) from individuals, businesses, foundations, corporations, and/or the public sector.
- Experience leveraging fundraising databases and support systems for donor segmentation, research, and targeted acquisition.
- A strong understanding of prospect research; social media; and emerging technology tools and how to leverage these technologies to connect with constituents and develop new funding streams would distinguish highly qualified candidates.
- Outstanding oral and written communication skills, along with the ability to be highly organized, creative, energetic, and assertive, and exhibit the independent judgment and personal integrity necessary to carry out a senior management role in fundraising.
- Ability to demonstrate superior stewardship and customer service skills both internally and externally.
- Ability to relate to top community leaders and diverse groups of people from all social and economic segments of the community.

- A genuine interest in and passion for the YMCA of Southwest Florida's mission
- Ability to work a flexible schedule, including frequent travel to YMCA of Southwest Florida locations, as well as some nights and weekends.
- Ability to meet the associations' requirements on background screening.
- Valid Driver's License

## WORK ENVIRONMENT & PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to use a computer for extended periods and be able to communicate using a computer and phone/smart device. The employee frequently is required to sit and reach and must be able to move around the work environment.

The employee must occasionally lift and/or move up to 10 pounds.

Specific vision abilities required by this job include close vision, distance vision, and the ability to adjust. The noise level in the work environment is usually moderate.

*YMCA of Southwest Florida has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the employee's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills, and abilities. Additional functions and requirements may be assigned by supervisors as deemed appropriate. This document does not represent a contract of employment, and the YMCA reserves the right to change this job description and/or assign tasks for the employee to perform, as the YMCA may deem appropriate.*

## SIGNATURE:

I have reviewed and understand this job description.

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Employee's name

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Employee's signature

Today's date: \_\_\_\_\_