



**United Methodist
Communities**



Vice President of Philanthropy Opportunity Guide

<https://umcommunities.org>



About United Methodist Communities

United Methodist Communities (UMC) is driven by principles of faith and its charitable mission to serve seniors of all faiths, backgrounds, and needs. UMC lives its mission daily: Compassionately serving in community so that all are free to choose abundant life.

Throughout its 112-year history, United Methodist Communities has continued to grow and innovate to meet the needs of older adults. The nonprofit, faith-based organization began when a few people responded to a bishop's post-Civil War challenge to house widows and orphans, and others responded to the need for retirement housing for Methodist missionaries, deaconesses, pastors, and laity. The first site, a small residential home in Ocean Grove, NJ, marked its beginning as a leader in senior living and care.

Each of UMC's full-service campuses has been designed as a continuum to allow residents to access multiple services under one roof. UMC customizes and scales services to accommodate residents' needs. Transforming the healthcare residences from traditional nursing into household models where residents can experience greater autonomy and satisfaction represents one innovation. Also, UMC offers Bridges Hospice and Palliative Care in private assisted living

neighborhoods for people who prefer not to or cannot receive these services at home, establishing a new model. UMC also operates UMC-HomeWorks, its homecare division, at three distinct locations across the state of New Jersey.

An infrastructure of aides, medical experts, nurses, exercise physiologists, therapists, and other specialists deliver care with a compassionate human touch. Complementing these, UMC utilizes proven innovative clinical interventions such as K4Connect and iN2L to maximize resident well-being, and VIVE to promote physical activity and conditioning. Consistent with its social accountability and faith-based traditions, UMC offers affordable campuses where seniors live independently in vibrant community settings. Community life brings multidisciplinary programs to keep older adults engaged on every level.

Recognized as a national trailblazer in creating senior spaces, UMC continues to push the sector to ensure older adults have access to services that are person-centered. Most recently, UMC was awarded a \$900,000 grant from the Federal Communications Commission to fund a remote patient-monitoring platform and telehealth software licenses for its skilled nursing units, ensuring residents have uninterrupted access to

healthcare services during and after the COVID-19 pandemic. Concurrently, UMC has begun planning for a new capital project called The Enclave. The Enclave will be a first-of-its-kind Center of Excellence memory-support community in the United States and will feature small house neighborhoods set in a town square fashion on 18 acres. The Center of Excellence will offer community integration and education around the issues of dementia as well as a university research component.

The [Great Place to Work Institute](#) has certified UMC as a Great Place to Work® for three consecutive years. To determine the Best Workplaces in Aging Services, Great Place to Work analyzed anonymous survey feedback from employees working in Senior Housing & Care and At-Home Care in the Aging Services industry in the United States. Attaining the Great Place to Work certification affirms associates' positive evaluations of UMC. Among these, 90% cited that their work has special meaning and 88% reported they feel a sense of pride regarding UMC's accomplishments. UMC President & CEO Larry Carlson said, "Achieving this national certification for the third consecutive year is not only an outstanding accomplishment, but amid the challenge of a world-wide pandemic, is nothing less than remarkable."



The Opportunity: Vice President of Philanthropy

UMC is seeking a senior-level philanthropic professional to complement and grow its development program. The Vice President of Philanthropy reports directly to the President & CEO and supports the advancement of UMC and the UMC Foundation. The Vice President provides oversight to all fundraising activities and drives the agency's philanthropic engagement strategy internally and externally, ensuring that philanthropy adds even further to the margin of excellence which UMC provides to its community and residents.

Over the past four years, the Foundation has created a strong operational program, supported by processes that facilitate a growing Culture of Philanthropy within UMC. Moving forward in maintaining these program activities successfully, this base will sustain current giving levels and create new opportunities for incremental growth moving forward. The greatest opportunity for this growth lies within UMC's planned giving program. The successful candidate will execute a comprehensive development plan that capitalizes on this opportunity while also focusing on campaigns, special events, annual giving, and major gifts.

The Vice President of Philanthropy will manage a portfolio of top donor prospects and provide leadership and guidance, in conjunction with the CEO, to the Foundation and UMC Boards, as well as lead and oversee the work of the Foundation team. Further, the Vice President will partner with the site Executive Directors and leaders to build community-level relationships and increase engagement with local leaders, families, and residents.

The Vice President of Philanthropy is supported by a team of development professionals including an Annual Giving Officer, an Administrative Assistant and a Manager of Grants and Communications who is shared with the Marketing & Communications Department. The Manager reports to the Vice President of Marketing & Communications with a strong, dotted line reporting relationship to the Vice President of Philanthropy.



Performance Objectives

Strategic Leadership

- Serves on the core leadership team of the organization, ensuring excellence in all areas of program delivery and service to the community.
- Drives the vision for UMC fundraising and establishes a strategic direction and goals to ensure the successful implementation of that vision, in partnership with the President & CEO.
- Partners with the Foundation Board of Trustees and the UMC Leadership Team in continually advancing the role and importance of philanthropy within the organizational culture.
- Develops individual and team performance goals, monitors goals regularly, and communicates individual and team performance assessments to successfully implement the UMC Foundation’s annual fundraising plan.
- Works with staff, volunteers, and members of the Leadership Team to implement fundraising plans by providing monthly, quarterly and annual evaluations, making adjustments when necessary to ensure success, and utilizing industry and historical benchmarks related to Return-On-Investment (ROI) to establish Foundation benchmarks.
- Develops and maintains productive and respectful relationships with members of the Leadership Team, the UMC Board, the Foundation Board, volunteers, donors, prospects, UMC staff, the philanthropic community, residents and their families, and other related constituency groups.
- Serves as an organizational resource by providing appropriate training and support to the Leadership Team, board members, and others involved in fundraising.
- Leads the campaign to underwrite the creation of The Enclave, both in terms of the physical establishment of such as well as the programmatic philanthropic opportunities.

Fundraising

- Manages all aspects of fund development, including staff and volunteer activities and relationships.
- Develops and manages an active portfolio of donor relationships, both campus specific and overall system-wide, as an active part of the Foundation team. In addition, supports and partners with the President & CEO and the Board in their philanthropic activities.
- Prospects for donors using the database, wealth screening, recommendations from stakeholders and other means to identify and qualify donors for stewardship opportunities.
- Provides strategic leadership in significantly growing and diversifying the Foundation’s donor base and giving levels in Annual, Major, and Planned Gift functions.
- Stewards an engaged “giving and getting” Board, providing leadership, training, and coaching as required.
- Supervises the database management activities fulfilled by the Administrative Assistant, as well as oversight of logistics for events, mailings, newsletter asks, grants, etc.
- Provides oversight to a strong, growing program of Charitable Remainder Trusts (CRTs), gift annuity agreements, wills and bequests, including possessing knowledge of charitable tax laws. Prepares documents for gift transactions, engages counsel for advice on such transactions and regulatory compliance, and accepts gifts and pledges as an agent for the Foundation.
- Identifies and secures gifts earmarked for the Endowment Fund.
- Oversees and works with the Manager of Grants & Communication on grant opportunities.
- Assures department’s compliance with regulations, statutes, and ethical and professional standards.



Performance Objectives

Organization Management

- Creates and submits the Foundation's annual work plan to the President and Board for endorsement, aligning the Foundation's goals and objectives with UMC's Strategic Plan.
- Determines annual Foundation performance goals for the annual fund, capital, endowment, and special project campaigns in partnership with the President, agency leadership, and key board members. Develops appropriate plans, budgets, and fundraising vehicles with the Foundation team to meet the performance goals.
- Ensures optimal fundraising policies and procedures and institutional philosophies are in place as a key member of the UMC Leadership Team.
- Monitors and reports regularly to the President, collaborates effectively with the UMC Leadership Team, the UMC Board and the Foundation Board on the performance of the Gift of Care Circle, the Presidential and Wesleyan Societies, capital campaigns and the development of the Endowment Fund.

External Community and Partner Relations

- Serves as an articulate, passionate, and visible spokesperson for UMC, and as a prominent face of fundraising throughout the community.
- Collaborates effectively with the Marketing & Communication team and other UMC leadership to ensure that the Foundation's outreach and messaging is consistent with the Corporate brand and mission so that it is being effectively communicated in all fundraising efforts.
- Creates and implements a plan to identify and build strong relationships with community leaders and volunteers and engage new community partners.
- Maintains presence at each UMC campus and ensures that each has the materials needed for passive solicitation (materials, posters, news articles, etc.) of residents and families.



The Qualified Candidate

United Methodist Communities seeks an innovative and collaborative individual with a minimum of seven years of effective fundraising and leadership experience in diverse, high-impact development programs. Preference is given to those who have managed fundraising efforts spanning multiple geographic sites, with significant leadership experience in fostering an organization-wide culture of philanthropy. It is imperative that the person who assumes this important role is passionate and committed to the full mission and vision of United Methodist Communities. Candidates who are energized by enriching the lives of older adults of every faith and background are encouraged to apply.

United Methodist Communities offers a competitive salary for this exempt position and a comprehensive benefit package, including medical, dental, vision, life, and supplemental insurance coverage, a 403b retirement plan with employer match, tuition reimbursement, and paid time off, including nine holidays.

United Methodist Communities is an equal opportunity employer and does not discriminate on the basis of race, color, gender, religion, age, sexual orientation, national or ethnic origin, disability, marital status, veteran status, or any other occupationally irrelevant criteria.

Specific Requirements Include:

- A strategic orientation to growing a philanthropic and marketing program, with demonstrated ability to develop and implement creative fund development and communications plans.
- Leadership experience in building teams and fostering a culture of collaboration and cooperation.
- Significant experience in securing funding from individuals, corporations, and foundations.
- Demonstrated ability to set and achieve or exceed goals.
- Career track record that shows stability with an organization and capacity to develop and nurture relationships culminating in major gift success.
- Excellent verbal and written communication skills, with the ability to serve as a key spokesperson for UMC and the UMC Foundation.
- Knowledge of and expertise in various major and planned gift instruments, and a proven track record of successful marketing of such instruments.
- Demonstrated ability to work successfully with board members and other volunteers, as well as civic and business leaders, in a collaborative manner.
- Proven ability to develop a highly productive, effective staff team.
- Creative problem solver and strong collaborator.
- Working knowledge of Bloomerang software.
- Bachelor's degree required. Master's degree and/or CFRE preferred.
- Seven years of progressive fundraising experience required. Experience with a faith-centered and/or senior living organization preferred.



How To Apply

To assure confidential tracking of all applicants, no applications will be accepted via email. ALL INQUIRIES WILL BE HELD IN STRICT CONFIDENCE.

This search is being managed by Heather Eddy, President and CEO, and Kiana Martin, Project Coordinator of KEES. Questions may be addressed to kmartin@kees2success.com.

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About KEES

KEES is an executive search firm that builds transformative nonprofit teams and leaders. Founded in 2013 as an expansion of Alford Executive Search, KEES partners specifically with nonprofit organizations to provide an array of executive search, leadership development, interim staffing and human resources services and support. For more information about KEES, please visit www.kees2success.com.