Math Motivators Fundraising Specialist
Opportunity Guide

www.actuarialfoundation.org

The Actuarial Foundation’s mission is to enhance math education and financial literacy through the talents and resources of actuaries.

About The Actuarial Foundation

The Actuarial Foundation was founded in 1994 as the philanthropic organization for the actuarial industry in the United States. Since its inception, the Foundation has promoted lifelong math education and financial literacy through the provision of innovative learning resources, tools and scholarships. The Foundation is at a key transition point in its history and is expanding both fundraising and programs to help middle school and high school students build math skills, readying them to truly thrive in a contemporary economy. Currently, it is thought that more than 250,000 jobs in the United States go unfilled each year because candidates don’t have the math skills to accomplish the job successfully.

The Actuarial Foundation receives unwavering support from U.S. actuarial organizations, including the American Academy of Actuaries, American Society of Pension Professionals and Actuaries, Casualty Actuarial Society, Conference of Consulting Actuaries, and the Society of Actuaries. Their trust and dedication to the Foundation’s mission are key elements of the Foundation’s continued growth and success. The actuarial and insurance industries are proud professions that play a significant role in society, ensuring business, commerce and other indicators of a
successful economy and society can thrive. The Foundation is located in Schaumburg, IL, close to public transportation.

**The Opportunity: Math Motivators Fundraising Specialist**

Actuaries have long been recognized for their voluntary service, dedication, willingness to help others, and spirit of professional unity. It is this history of service, coupled with the unique gifts that actuaries offer to society, which form the core of The Actuarial Foundation – the only U.S. philanthropic organization representing the actuarial profession.

One of the Foundation’s signature programs, the Math Motivators Tutoring Program, aims to close the opportunity gap and, in turn, the achievement gap, by pairing high school students from underserved communities across the United States with actuaries and college students majoring in actuarial science, mathematics or math education. Thanks to the generosity of the actuarial community, this award-winning program has expanded from its start in 2015 at one site to 60 sites in 30 cities and 18 states plus Washington DC throughout the country and is currently serving more than 1000 students annually. Nearly 75% of students are people of color and 100% reside in underserved communities. The number of volunteer tutors has increased over the years and now totals more than 550. Recently the program has expanded its offerings to include virtual tutoring which will continue as in person tutoring resumes post-pandemic.

Math Motivators will continue to expand to reach more underserved and/or low-income students across the country. Over the next three years, the program will increase engagement of schools and centers from 60 to 90 and will double the number of students served from 1000 to 2000. To support this growth and outreach, the program will expand the grade levels served to include upper elementary school (Grades 3-5), incorporate new service-delivery models, increase financial literacy tutoring, and continue to expand educational resources (e.g., curriculum, assessment, tutor training). In addition, formal evaluation of the Math Motivators model and program will help the foundation to continuously improve its program and demonstrate its impact.

The program’s founder and champion is Actuarial Foundation Emeritus Trustee Barry Jacobson, who was spurred into action by a need he identified; one that he and his professional colleagues could fill.

Math Motivators uses a 2:1 model. Two students of similar ability are paired with one tutor, who works with the students to help them become proficient in math. Tutors make a difference by sharing their knowledge, talent, and abilities with students. Serving as a mentor and a leader for students is a meaningful and rewarding experience for both tutors and students.

In an effort to grow and expand the impact of the Math Motivators program, The Actuarial Foundation is seeking a Fundraising Specialist with a proven track record of success to join their team. A newly created position, the Fundraising Specialist will...
report directly to The Actuarial Foundation’s Director of Development, Valerie Thompson.

The successful candidate will work closely with the Director of Development to create and implement a comprehensive fundraising strategy for Math Motivators including increasing engagement and support from individuals, volunteers, companies, foundations, universities, and other prospective funding sources. The candidate will also work closely with the Math Motivators program and fundraising team to explore new funding opportunities, identify contacts, initiate outreach, present information to prospective donors/supporters and track activities to identify opportunities for philanthropic support. The ability to bring creative strategies and build strong relationships and human connections will be integral to success in this role.

Currently, the Math Motivators’ $1.5 million annual philanthropy budget is comprised of contributions from its generous and engaged supporters including foundations and corporations as well as some individual support, an area which the Foundation has identified as an opportunity for growth. The Foundation is looking to expand opportunities for increased giving and add new donors to the mix, ensuring the future of its programming through diversification of revenue streams. The Fundraising Specialist role is an opportunity for a self-starter focused on building relationships who will relish the opportunity to drive revenue, resulting in impact on math and financial literacy education across the country.

Performance Expectations

Philanthropic Leadership

- Partner with Foundation elected and staff leadership, focusing on building and growing a comprehensive and diversified philanthropic program to fund the program’s mission delivery.
- Work with and provide training and support for stakeholders to increase fundraising understanding and activity, as well as solicit and close gifts for the Math Motivators program.
- Craft a strategic development plan that integrates identification and expansion of opportunities to fund the program such as an annual fund campaign, foundation and corporate support, individual giving, and impactful events.
- Lead initiatives to identify and qualify prospects and cultivate and steward them into donors. Assess the appropriate time, method and strategy to best achieve fundraising success while meeting donor intent.
- Work with volunteers throughout the program to coordinate and maximize philanthropic efforts in their regions and nationally.
- Identify and take steps to continually strengthen the culture of philanthropy throughout the organization.
- Identify and secure multi-year, long-term, or creative and new fundraising opportunities to grow sustainability while maintaining current levels of support.
Fundraising & Donor Relations

- Craft gift acknowledgement and stewardship communications, case statements, grant proposals and other fundraising materials.
- Travel as necessary (likely 3-4 trips a year) to establish and maintain excellent donor relations.
- Build and continually manage an effective pipeline of individual, corporate and foundation supporters, including prospect identification, cultivation, solicitation and stewardship processes.
- Nurture partnerships and relationships with current and prospective donors through new and existing recognition programs and stewardship. Cultivate long-term relationships to ensure continued support, engagement and involvement.
- Conduct face-to-face meetings with donors and prospects to discuss philanthropic goals and how those goals align with the work of Math Motivators.

Financial and Donation Management

- Track and manage a moves management system in the donor database.
- Maintain accurate and comprehensive donor records in the database including call notes, donor profile information, correspondence, gift acknowledgements, etc. Track all donor work in established systems and use data to effectively design and monitor development strategy, moves and goals.
- In collaboration with appropriate staff, ensure all gifts are appropriately represented, recognized and reconciled in the financial management system.
- Prepare fundraising financial reports and dashboards as needed, including progress towards financial goals, revenue, and expenses related to fundraising.

The Qualified Candidate

The Actuarial Foundation seeks an innovative, entrepreneurial, and strategic Development professional to join the team. The successful candidate will possess a minimum of three years of successful fundraising experience and a passion for providing educational opportunities for students who may want to enter a profession for which they need extra academic support. The successful candidate will be an energetic and collaborative colleague with notable institutional and individual giving experience. The exceptional candidate will possess a strong ability to build relationships with donors and be able to speak persuasively to the transformative power of math education. Preference is given to those who have fundraised in an association foundation or education setting.

Specific Requirements Include:

- A demonstrated passion for supporting educational opportunity; math-specific preferred.
- A minimum of 3 years of progressive development experience with a demonstrated focus on institutional (corporate/foundation) giving, preferably within an association foundation or an educationally focused mission.
• Proven track record of fundraising success, particularly by securing 5-figure gifts, successfully managing a portfolio of donors and prospects, and engaging a community of motivated supporters.
• Proven ability to build solid, trusting relationships with donors at all levels, especially in the individual, corporate and foundation spheres. Demonstrated capacity in developing strong external relationships with a variety of volunteers, public leadership, partner organizations, and other stakeholders.
• Working knowledge of best development practices, trends in association fundraising, fundraising tools and technology, including donor research and email and online campaigns.
• Excellent verbal and written communication skills.
• Natural curiosity with a passion for listening to and learning from others is essential.
• Time management mastery and an ability to effectively work within a fast-paced work environment.
• Career track record that shows stability with an organization and capacity to develop and nurture relationships culminating in overall success.
• Bachelor's degree or equivalent work experience is required.
• Past experience using fundraising software such as Raiser’s Edge and Virtuous is preferred.

How To Apply

Click here to complete the online application and submit a cover letter and resume.

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

This position offers a competitive salary with strong benefits. The Actuarial Foundation will provide equal opportunity to all employees and applicants for employment regardless of actual or perceived race, color, religion, age, sex, pregnancy, national origin, ancestry, disability (mental or physical), genetic information, military or veteran status, marital status, order of protection status, gender identity, sexual orientation or any other category protected by applicable law.

This search is being managed by Laura Weinman, Vice President of KEES. Questions may be addressed to lweinman@kees2success.com

About KEES

KEES (formerly Alford Executive Search) is a nonprofit executive search firm that builds diverse teams and dynamic leaders in the nonprofit and public entity sectors. A woman owned and operated firm, KEES offers a full array of nonprofit consulting services including executive search, leadership development, interim staffing, and HR support. For more information, please visit www.kees2success.com.