

Cleveland Foundation

Senior Vice President, Advancement
Position Specification

2022



Organization Overview



ORGANIZATION OVERVIEW



- Organization
- Foundation Leadership
- Financials
- Overview

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ENGAGEMENT TEAM

Cleveland Foundation

[Leadership Team](#) and [Board of Directors](#)

[2020 Financials](#)

For more than 108 years, the Cleveland Foundation has worked with donors, nonprofit organizations, and community partners to enhance the quality of life for all Greater Cleveland residents. With a focus on Cuyahoga, Lake and Geauga counties, the foundation builds community endowment, addresses needs through grantmaking and social impact investing, and provides leadership on vital issues. The foundation supports and partners with leaders and organizations working in a variety of fields, including:

[Education](#)

[Neighborhood Revitalization & Engagement](#)

[Youth Development, Health & Social Services](#)

[Arts and Culture](#)

[Economic & Workforce Development](#)

[Environment](#)

The Cleveland Foundation is the world's first community foundation and one of the largest today, with over \$3.2 billion in assets. In 2021, the Foundation lifted up the community with over \$124 million in grants. In addition, contributions from its generous donors totaled almost \$125 million.

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- New Headquarters in MidTown

This is an exciting time at the foundation, as it prepares to move its headquarters into Cleveland's MidTown neighborhood in late 2022. This move will usher in a new era for the Cleveland Foundation and a new way of working with the community. Its new home will provide accessible community space for the people of Greater Cleveland to come together, work together and celebrate together. Building its new home at the center of Cleveland's core will connect the foundation with the amazing work that is planned or already underway in the area, including the long-standing vision of Dunham Tavern Museum to make its campus welcoming and inviting to neighborhood residents; the creation of an innovation district that is focused on an economy that will work for everyone, with jobs of the future for all skill levels; as well as the reimagining of E. 66th Street that has been designed by residents and youth alike to connect the city north to south from Superior Avenue to Euclid Avenue.

Learn more about the building design [here](#).

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- New Strategic Direction

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- The Foundation's History

It is not just the foundation's physical space that is changing. The Cleveland Foundation is [developing a new strategic direction](#) to guide its work over the next decade. The process began before the pandemic, and the experiences of the past two years months have only strengthened its conviction that it must work in close partnership with the entire community to respond to immediate needs as they emerge, while also focusing on how to address the root causes of persistent issues like generational poverty and racial injustice. After months of deep listening in the community, and through partnership between the foundation's board and staff, the organization has aligned on three strategic impact areas to guide its work: **fostering inclusive economic prosperity; creating pathways to opportunity; and building and sharing power.**

This new strategic direction is about more than just grantmaking – it's an enterprise-wide strategy that seeks to coordinate its goals and impact in every facet of its work – the way it communicates, the people it hires, the investments it makes, and more. Instead of a rigid plan that sets a particular course over the next decade, the foundation wants this strategy to be evolving and continuously informed by the community. Its north star will be its values as an organization and its commitment to work with the entire community toward shared goals.

Learn about the foundation's history [here](#).

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- Social Impact Investing Program

The Cleveland Foundation is a national leader in social impact investing. In 2019, the foundation announced a commitment to allocate \$150 million in social impact investing capital by 2022, exceeding that goal two years earlier than expected. The program is among the largest community foundation social impact investing initiatives in the country. As such, it stands to influence the market and the practice of social investing in addition to its primary purpose of advancing Northeast Ohio’s economy and its place-based mission. The Cleveland Foundation defines social investments as opportunities that align social good with financial return to bring about social change. Its long-term social impact investment objective is to achieve a meaningful impact that benefits the social health of the community and preserves or recycles capital while achieving a positive real return on loans and investments.

Learn more about the social impact investing program [here](#).

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- Commitment to Racial Equity and Justice

The Cleveland Foundation has a longstanding commitment to promoting racial equity engrained in its grantmaking and community engagement initiatives, heightened by the recent national reckoning on systemic racism. The foundation wants to operate in a way that reflects the entire community and disrupts the forces of systemic racism at every turn. To do this, the foundation is looking at the ways it can promote racial justice across the organization and its work – the grants it makes, the partners with whom it works, the people hired, how it communicates, how it can invest its money, its culture, policies and practices.

In recent years, the foundation has partnered with [ThirdSpace Action Lab](#) to support access to workshops presented by the Racial Equity Institute (REI). Every Cleveland Foundation board and staff member has participated in these workshops, and more than 10,000 citizens within the community and beyond have participated in at least one of REI’s workshops. These participants represent more than 800 organizations across the region.

In 2020, the foundation launched the [Cleveland Black Futures Fund](#), which has since amassed more than \$4.3 million to invest in and strengthen Black-led and Black-serving social change organizations. It also leveraged its full investment portfolio to advocate for progress in diversity among investment managers and corporate boards, which you can learn more about [here](#).

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- Role
- Location
- Reports To
- Direct Reports

Senior Vice President, Advancement

Cleveland, Ohio

[Ronald B. Richard](#), President and Chief Executive Officer

Advancement Team

- General Counsel & Senior Director, Gift Planning
- Senior Director, Development & Philanthropic Initiatives
- Senior Director, Advancement Equity Initiatives
- Director, Philanthropic Services
- Executive Assistant

- Position Summary

The Cleveland Foundation seeks a creative and innovative fundraising leader to serve as its Senior Vice President, Advancement to lead the foundation’s philanthropic efforts and donor services team during an exciting time in the organization’s history. As the Foundation launches a new strategic plan and moves into a new headquarters, the SVP, Advancement will be a key part of the organization’s growth and will have responsibility for shaping and implementing the Foundation’s fundraising strategy and donor services program.

The SVP will implement a targeted fundraising strategy and increase community presence; refine and maintain a donor services program that provides a standard array of services for various donor and committee-advised funds and supporting organizations, etc.; and serve as an officer of the foundation, member of the Foundation’s senior management team, and senior advisor to the President and CEO.

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- Key Performance Indicators and Metrics

The SVP, Advancement holds ultimate responsibility for Advancement Team’s management and performance. Tangible results are:

- cash raised per year (new funds and additions to existing funds);
- new planned gift commitments; and
- donor alignment with foundation goals

- Social Media



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- Responsibilities

STRATEGY AND VISION

- Update the Advancement strategy, in alignment with the Foundation’s overall strategic planning. Align management of the team to the strategy. Realign staff to add capacity for strategic planning implementation, while at the same time maintaining current levels of dollars raised and new planned gift commitments secured. Identify and create new strategies for attracting new donors, new DAF opportunities, non-cash asset donations, and new pipelines for younger and more diverse donors.
- Update the Advancement Strategy in relationship to the Foundation’s move to Midtown. Create and executive the vision for the new Center for Philanthropy in the Foundation’s new HQ. Including the integration of the Foundation for Philanthropy Younger Donor Cohort Model across and with the Foundation’s leadership programs and across the enterprise. Include Midtown community partners as well as major corporations in cohort classes.
- Collaborate with Executive Committee colleagues, particularly Marketing and Finance, on identifying and implementing new approaches that expand opportunities for Advancement to attract new donors.
- Maintain a SWAT analysis of trends in the field, products, and competition. Revisit pricing programs that are competitive and creative to attract donors. Align fees with objectives and return on resources deployed and align staff commensurate with revenue.

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- Responsibilities (continued)

STRATEGY AND VISION (continued)

- Ultimate responsibility for implementation of major new initiatives related to “Foster Economic Prosperity,” including focus on building donor and organizational participation in the SRI and REI pools.
- Ultimate responsibility for implementation of major new initiatives related to developing a more diverse donor base including building out “Friends of the AAPC,” as well as outreach to BIPOC-led orgs.
- Ultimate responsibility for implementation of major new initiatives related to “Groundwater & Narrative Shift,” including educating donors regarding REI and TCF work in this space.
- Serve as a member of the Foundation’s senior management team and executive committee.

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- Responsibilities (continued)

PEOPLE MANAGEMENT and COMMUNITY INVOLVEMENT

- Provide consistent developmental support and guidance to direct reports to ensure that they have the tools, information and coaching necessary to carry out their work at the highest level. Create an inclusive, equitable, rewarding environment that focuses on regular and clear communication around individual expectations, team and organizational developments and objectives; mentoring, developing and challenging employees; and resolving employee issues.
- Direct and manage department staff, activities, and budgeting, including: 1) processing and counting planned gifts; 2) processing new gifts; 3) implementing and directing prospect research and profiling systems; 4) continuous refining of departmental marketing and written materials; 5) maintaining database recordkeeping systems; 6) developing annual department budget and monitoring expenditures; 7) plan and execute events for donors and intermediaries
- Oversee Senior Director, Advancement Equity Initiatives with overall leadership of the African American Philanthropy Committee (AAPC), including biannual Summits. Incorporate themes from strategic plan in meeting agendas.
- Oversee Senior Director's leadership of new initiative-based fundraising across the three impact priorities. Participate on task force. Provide support for Senior Director as needed.

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- Responsibilities (continued)

PEOPLE MANAGEMENT and COMMUNITY INVOLVEMENT (continued)

- Lead the Advancement Team in developing presentations that align with the overall fundraising strategy and tie in strategic goals.
- Represent the Foundation, and staff the CEO and other community leaders, as needed, in raising funds for major community-wide initiatives (e.g. Say Yes Cleveland) and foundation-specific initiatives (e.g. new headquarters building and other developments in Midtown).
- Represent the Foundation at the local and national level (e.g. Amelia Group – peers from community foundations with AUM greater than \$1 billion).
- Represent the Foundation in national and state advocacy initiatives related to legislation affecting community foundation fundraising (e.g. tax changes, new restrictions for DAFs, etc.).
- Develop a substantive knowledge, and recognized standing locally in the development field, as well as regionally/nationally in the foundation field.
- Collaborate with, provide support to, and prepare materials for, members of the Board of Directors.

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- Responsibilities (continued)

ADVANCEMENT EXECUTION

- Develop and maintain contact with a broad cross-section of current and potential donors and professional advisors through personal visits and calls, intermediary presentations, seminars, workshops, donor events. Cultivate ideas on how to align their giving with the foundation's strategies.
- Oversee the Philanthropic Services team and its donor services program that provides a standard array of services for various donors and their funds. Lead donor services staff members in their work with ongoing stewardship of individual, organizational, and planned gift donors. Lead team in identifying existing donors with capacity to add to their funds, and/or establish additional funds, and then working proactively with these donors to increase their investment with the Cleveland Foundation.
- Oversee development and outreach efforts and donor messaging and communications led by the Senior Director, Philanthropic Initiatives. Mentor and collaborate with EC staff in this area to ensure that goals around board cultivation, community outreach and cultivation of new prospects are in line with the strategy of the advancement team to ensure the successful achievement of all goals in this area.
- Oversee the Gift Planning team to proactively seek referrals from professional advisors, whose clients will become donors to the Cleveland Foundation. Periodically review gift services and align their fees in accordance with resources needed to sustain the activity.
- Utilize CEO and other Foundation leadership, as appropriate, in cultivating high level prospective donors and in expanding relationships with current high-level donors.

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- Pivotal Experience & Expertise

Fundraising and Development Expertise: 10+ years of experience working in a high-performing fundraising team with a track record of demonstrated success as a visible and credible leader, who has built successful internal and external relationships in a philanthropic or professional services organization. Knowledge and experience in major gift fundraising, as well as the financial/legal aspects of planned giving. Expertise in creating and executing creative and innovative donor relations strategies or partnerships.

Leadership and Operational Management: Exceptional capacity for managing, leading, and developing people to successfully achieve collective goals and objectives. Experience working as part of a multidisciplinary team and working effectively with persons and communities from diverse cultural, social, and ethnic backgrounds. Proven ability to work in a complex environment requiring significant collaboration. Outstanding people skills and excellent written and oral communication skills. Strong planning and organizational skills, with the ability to think strategically in the design and execution of programs. Unquestionable integrity, ethics, and superior judgment.

Mission and Community Orientation: An intellectual curiosity and passion for the mission of the Cleveland Foundation combined with an orientation for working alongside with and in communities whom the foundation serves. Knowledge of the Greater Cleveland business, philanthropic, and not-for-profit community would be additive.

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- Culture Impact

Collaborative: Demonstrated experience collaborating across organizations and within communities to effect change.

Relationship Builder: Demonstrated ability to build relationships, networks, and partnerships, both internally and externally.

Ethics, Integrity, Humility: Humble, low ego and transparent; open to learning and understanding existing culture and history; exercises good judgment.

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PAY AND BENEFITS

The Cleveland Foundation makes internal pay equity a priority for individuals across all positions. Based on the foundation's salary program, estimated annual salary for this position may be anywhere between \$232,000 to \$275,000, based on the academic, professional and community experiences and credentials of a candidate. The foundation offers an exceptional benefits package including medical, dental, vision, identity theft, and life and disability coverage, a comprehensive wellness program, an employee assistance program, a fully vested 403(b) retirement plan, ten paid holidays and, for non-exempt positions, 15 days of vacation and 12 sick days, prorated the first year of service based on date of hire.

COMMITMENT TO DIVERSITY, EQUITY AND INCLUSION

The Cleveland Foundation exists to enhance the quality of life for all citizens of Greater Cleveland. The ability to carry out our mission and to foster our commitment to diversity, equity and inclusion can best be pursued if our workforce, grantees, donors, partners and governing body are inclusive of individuals of diverse backgrounds, beliefs and perspectives.

We believe that diversity encompasses, but is not limited to, age, color, education, ethnicity, family or marital status, gender, gender identity or expression, language, national origin, physical and mental abilities or characteristics, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and/or other characteristics that make an individual unique.

The Cleveland Foundation is committed to equal employment opportunities for all.

NOTE

The Cleveland Foundation staff will return to the office at least two to three days per week beginning April 4, 2022. The Cleveland Foundation requires all employees to be fully vaccinated against COVID-19 and provide valid proof of vaccination, unless a documented medical or religious exemption is approved. All information provided will be kept strictly confidential.

Engagement Team



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NOMINATION AND APPLICATIONS

Initial screening of applications will begin immediately and continue until the position is filled. Nominations and applications should be directed to: mashbrock@heidrick.com.

Heidrick & Struggles serves the executive leadership needs of the world's top organizations as a trusted advisor for leadership consulting, culture shaping and senior-level executive search services. Our data driven solutions empower senior executives and boards of directors to transform their organizations by leveraging top talent and accelerating performance across all layers of the business.