



CHIEF OF INSTITUTIONAL ADVANCEMENT
RUTH & NORMAN RALES JEWISH FAMILY SERVICES
Boca Raton, Florida

THE SEARCH

Ruth & Norman Rales Jewish Family Services (Rales JFS) seeks an exceptional and results-oriented advancement professional to serve as its inaugural chief of institutional advancement (CIA). Rales JFS has grown significantly since its inception, expanding from counseling and senior services to include an extensive range of services and programs for all individuals in the community regardless of need, background, or religious affiliation. In response to the agency's growth, momentum, and success, particularly over the past decade, the CIA will lead the development and implementation of a strategic, comprehensive, best-practice fundraising program to support the future direction and impact of Rales JFS in the community.

This is an exciting opportunity for a dynamic advancement professional to design and implement a comprehensive fundraising strategy for Rales JFS. Building upon the success of the agency's fundraising efforts to date, the CIA will set the overarching vision and develop the supporting infrastructure, policies, and practices to expand, integrate, and elevate activity across major and annual gifts, events, planned giving, and corporate and foundation giving. The CIA reports directly to Danielle Hartmann, president and chief executive officer (CEO), and will play an integral role in advancing Rales JFS' strategic plan as a member of the senior leadership team.

With a track record of leadership in successful development programs, ideally within healthcare or higher education, the CIA must possess strong managerial, strategic planning, and motivational skills; a keen understanding of best practices in fundraising; and a track record of significant personal success in donor cultivation, solicitation, and stewardship at the major and principal gift levels. The CIA will exhibit the credibility and emotional intelligence to effectively engage and partner with key internal and external stakeholders. As an externally focused senior leader of Rales JFS, the ultimate hire will possess exemplary presentation and written communication skills. The CIA will have a deep appreciation for Rales JFS' mission, vision, and accomplishments, and will contribute to a culture that is dedicated to excellence, kindness, and positive community impact. A bachelor's degree is required; advanced degree is preferred.

Rales JFS has retained Rachel Ellenport of the national executive search firm, Isaacson, Miller, to assist in this important recruitment. Confidential inquiries, nominations, and applications should be directed to the search firm as indicated at the end of this document.

RUTH & NORMAN RALES JEWISH FAMILY SERVICES

Established in 1979 as the first agency of the Jewish Federation of South Palm Beach County, Rales JFS became an independently incorporated 501(c)(3) non-profit agency in 2001. With continued growth and expansion over the following decades, Rales JFS' programs and services today include food and financial services, senior services, behavioral health services, career and employment services, family and children's services, and numerous volunteer opportunities. Rales JFS is a non-sectarian agency.

Rales JFS has locations in Boca Raton and Delray Beach. The continuing expansion of services and programs reflects Rales JFS' response to the evolving needs of the community. This past year, Rales JFS had more than 30,000 visits, and the intake department fielded over 1,500 phone calls for help and connections to services. The agency's staff includes licensed clinical social workers, psychologists, psychiatrists, and case managers. With the continuing influx of individuals moving to the Palm Beach County area and the impact of inflation on individual and family budgets, the Rales JFS team continues to expand the reach and support of their programs to serve the growing demand and needs of the local community, particularly in food programs and behavioral health services.

To learn more about Rales JFS, visit: <https://ralesjfs.org/>.

The Toby and Leon Cooperman Therapy & Family Resource Center

In response to an unmet need in the community, Rales JFS secured initial seed funding in 2021 from the Norman and Ruth Rales Foundation to launch a Therapeutic and Family Resource Center. An additional \$4 million capital campaign, including a \$2 million transformational gift from Toby and Leon Cooperman, enabled the establishment of Rales JFS' newest endeavor, the Toby and Leon Cooperman Therapy & Family Resource Center (Cooperman Center).

The Cooperman Center is an expansion of an existing set of services currently being provided to the community through Rales JFS' Special Needs Department. The Cooperman Center serves children with special needs from birth to 22 years of age and provides a one-stop shop where all family needs can be met. The center offers a variety of therapy options, support groups, classes, and workshops for the whole family. Since launching in June 2022, the Cooperman Center has provided over 982 therapy sessions to 59 children.

The objectives of the Cooperman Center include:

- To provide children with varying needs and abilities affordable access to treatment and therapies, which allows them to realize their maximum developmental, educational, and personal potential.
- To equip parents and other caregivers with the necessary information and support to ensure a therapeutic continuum.
- To provide the education and guidance needed to build stronger families.

Strategic Plan

In January 2021, the Board of Directors approved a new three-year strategic plan. The strategic plan establishes five overarching goals:

- **Infrastructure:** Plan for the future physical infrastructure needs of the agency.
- **Seniors:** Enable isolated, homebound seniors to age in the place they feel most comfortable, regardless of their ability to pay.
- **Families and Children:** Plan for the future needs of at-risk families and children, including those with special needs.
- **Revenue and Fundraising:** Sustain the agency through diversified revenue streams.
- **Community Engagement:** Actively engage the community through volunteering and education.

Leadership

Danielle Hartman, President and CEO

Danielle N. Hartman joined Ruth & Norman Rales Jewish Family Services (JFS) as President and CEO in March 2010. Under her leadership, the operating budget has grown to over \$20M and legacy gifts have grown to \$15M. Since joining the organization, she has focused on diversifying the way the agency is funded, specifically by growing programs that generate fees, and creating unique community partnerships to expand services.

Danielle received her M.S. in Nonprofit Management from FAU in 2010 and was recognized by FAU in 2017 as a Distinguished Alumna. In addition to her role at JFS, she currently is active on the Board of Advisors for the FAU Sandler School of Social Work, the Advisory Board of the Center for Arts and Innovation, and the United Way's Palm Beach County Hungry Relief Advisory Committee. She is a past Board Member of the National Association of Jewish Human Service Agencies (NJHSA) and has presented at several conferences on a variety of topics including women in the workforce, diversifying revenue streams, and governance. She is currently working with the FAU Sandler School of Social Work on content for two asynchronous modules on strategic planning and the business side of running a non-profit as part of their management certification program.

Fundraising and Financials

In Fiscal Year 2022, more than 75 percent of Rales JFS' revenue came from philanthropic sources, including \$1.3 million from fundraising events, \$4.7 million from contributions and pledges, and \$10.9 million in grants. Funding is provided by individuals, corporations, grants, and special events. Every year, Rales JFS hosts four major fundraising events, which include their annual gala, Reflections of Hope luncheon, golf tournament, and a game night.

CHIEF OF INSTITUTIONAL ADVANCEMENT

The inaugural chief of institutional advancement will play a pivotal role in advancing Rales JFS' mission and ensuring its long-term sustainability. Reporting directly to the CEO, the CIA will build upon the prior success of Rales JFS' fundraising programs and strategically lead the implementation of a comprehensive, best-practices advancement function. They will build structure and systems for successful programs across major and annual gifts, events, corporate and foundation giving, and planned giving. The CIA will lead fundraising and development activities, cultivate strategic partnerships, foster strong donor relationships, and expand philanthropic support.

Key Responsibilities and Duties

- Develop and execute a comprehensive fundraising strategy aligned with Rales JFS' goals and mission, including annual and major gifts, corporate sponsorships, grants, planned giving, and special events. Implement systems and best practices to optimize the fundraising function.
- Cultivate and steward relationships with current and potential donors, identifying opportunities for increased engagement and philanthropic support.
- Evaluate, strengthen, and enhance existing individual giving (annual, major, principal, and planned), and corporate and foundation relations programs. Develop and implement new and innovative plans to systematically and strategically identify and acquire prospective individual and institutional donors, increase donor retention, and renew and upgrade existing donors.
- In collaboration with the director of special events, develop, oversee, and attend special events for Rales JFS, including the annual gala, Reflections of Hope luncheon, golf tournament, and game night.
- Personally identify, cultivate, solicit, and steward major individual and institutional donors, while also providing guidance and support to board members, the CEO, and other staff involved in major gift solicitations.
- Foster strategic partnerships with corporations, foundations, and businesses to secure sponsorships, grants, and in-kind support.

- Collaborate with the CEO and board members to engage the board in fundraising efforts, providing support, training, and resources to board members to maximize their fundraising potential.
- Lead and inspire a high-performing development team, providing mentorship, guidance, and professional development opportunities.
- Serve as an active and contributing member of the CEO's senior team. Build strong, collaborative professional relationships with peers and foster a strong team orientation. Participate in agency-wide strategic planning efforts and contribute to discussions that guide strategies and policies shaping Rales JFS' future.
- Oversee the grant-seeking process, including prospect research, proposal writing, and grant reporting, ensuring compliance with funder requirements.
- With a keen eye for data integrity, ensure the design and maintenance of donor and prospect records, gift management systems, and informational reports, as well as prospect research efforts.
- Oversee timely acknowledgment, stewardship, and recognition programs, providing feedback and creating necessary systems as necessary.
- Utilize data and analytics to drive fundraising strategies, monitor progress, and make informed decisions.
- Represent Rales JFS externally, building relationships with community leaders, partner organizations, and stakeholders to enhance the Rales JFS' visibility and impact.

Qualifications and Experience

The chief of institutional advancement will bring many, if not all, of the following professional qualifications, skills, and experiences:

- A minimum of ten years of progressively responsible fundraising and managerial experience in advancement, preferably in a healthcare or higher education setting; depth of knowledge and best practices in all key areas of advancement.
- A deep appreciation for the history, achievements, and aspirations of Rales JFS, and the ability to effectively articulate the president and CEO's vision to a diverse audience.
- A broad-based knowledge of all functions of development, including the use of databases and of major and planned giving techniques.
- A demonstrated ability to plan and operate strategically; build public support; strengthen

infrastructure; inspire staff and the Board of Directors; and develop effective programs.

- Exceptional interpersonal and relationship-building skills, with the ability to engage, influence, and steward a diverse range of stakeholders, including donors, board members, volunteers, and community partners.
- A self-starter who is confident enough to express opinions, forging ahead when appropriate and holding back when necessary, and with a sensitivity to the feelings and opinions of others.
- Proven achievement in creating a team- and goal-oriented environment that empowers staff through active communication, and that builds confidence and celebrates accomplishments; a successful track record of building and maintaining highly collaborative and productive teams.
- A proven track record of success in personally cultivating, soliciting, and stewarding major and principal gifts from individual and institutional donors.
- Superior written and oral communication skills; the ability to understand and translate information for all audiences; clarity and eloquence in writing and speaking.
- Forward-thinking and able to identify emerging trends and opportunities in philanthropy and fundraising, ensuring the organization remains innovative and adaptable.
- Proficient in data analysis and utilizing data-driven insights to inform fundraising strategies and decision-making.
- Thrives in a fast-paced, dynamic environment, adapting to changing priorities and challenges.
- The ability to juggle many responsibilities at once and to operate both independently and collaboratively as part of a team.
- A sharp eye for operational efficiency and the best use of resources, including a demonstrated understanding of budgets and the ability to manage them.
- The personal flexibility to work evenings or weekends as required.
- A bachelor's degree is required; an advanced degree is preferred.

TO APPLY

Rachel Ellenport is leading this search with Bryce Ervin and Lisa Clayton. For more information, to submit a nomination, or to apply for this role, please visit:

<https://www.imsearch.com/open-searches/ruth-norman-rales-jewish-family-services/chief-institutional-advancement>

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