LAKEWOOD
CEMETERY · CREMATION · COMMEMORATION

POSITION DESCRIPTION

Job Title: Philanthropy & Legacy Giving Officer
FLSA: Exempt
Department: Lakewood Foundation
Reports To: Director of Impact & Advancement

ORGANIZATION BACKGROUND

Lakewood is one of the most distinguished and progressive cemeteries in the nation — a Minnesota landmark renowned for its history, art and natural beauty. As a nonprofit serving families for over 150 years, Lakewood remains devoted to its mission of memorialization, while actively reimagining the role of a cemetery in modern life. Visit our website for more information: lakewoodcemetery.org.

The Lakewood Foundation is a nonprofit 501(c)(3) organization created to broaden and deepen Lakewood's community impact and engagement through educational programming and preservation and restoration of Lakewood's landscape, art, architecture and public spaces—for the benefit of all.

OVERVIEW

The Philanthropy and Legacy Giving Officer is a new role responsible for developing and growing philanthropic support for the Lakewood Foundation through major gifts, planned gifts and community giving. This role is an exciting opportunity to develop meaningful relationships with donors, prospects, families and community supporters whose philanthropic interests align with Lakewood's vision and programming, helping to create lasting impact through current and future charitable investments. This role also helps build the Foundation's organizational strength by creating and shaping policies, processes, and leading practices toward developing as a best-in-class organization.

This is a highly collaborative role that interacts closely with board, leadership and team to develop unique and impactful giving opportunities and strategies. A primary focus is to identify, cultivate, solicit, and steward major gift and planned giving donors, while also identifying opportunities for broader community giving.

RESPONSIBILITIES

Strategic & Organizational Development

- Immerse and align with Lakewood's mission, vision, brand and strategic priorities.
- Articulate the Foundation's case(s) for support and messaging to communicate the unique value of the Foundation and how it contributes to public benefit.
- Help define early wins and focus areas for the Foundation.
- Identify, communicate and prioritize giving opportunities that support Lakewood programs and projects, including one-time and 'evergreen' giving opportunities.
- Champion the Lakewood brand and messaging through all donor interactions and communications.
- Help integrate philanthropic initiatives across the organization. Refresh Foundation elevator speech and talking points for the board, leadership and staff.
- Participate as an active member of the Lakewood team. Contribute to shared goals and partner closely with colleagues on achievement of organizational priorities.

Major Gifts

- Identify and manage a portfolio of major gift prospects and donors.
- Identify donors' passions and interests, build relationships, and leverage those relationships into meaningful support opportunities.

- Develop individualized cultivation, solicitation and stewardship strategies.
- Conduct donor visits and other relationship-building activities.
- Prepare gift proposals, cases for support, and stewardship reports.
- Partner with the President, Board, and Director of Impact & Advancement to secure significant philanthropic commitments.
- Maintain an active pipeline of qualified major gift prospects.

Planned and Legacy Giving

- Develop a planned giving program for Lakewood.
- Research and recommend charitable gift planning opportunities.
- Steward legacy donors and administer recognition programs.
- Track planned gift intentions and maintain appropriate documentation.

Community Giving

- Strategize with Lakewood's Marketing and Community Engagement teams to develop marketing and outreach efforts that encourage community giving.
- Assess and optimize community giving opportunities and touchpoints (on site, digital, etc.).

Donor Stewardship and Advancement Operations

- Support the development of processes that facilitate giving — develop a point of view on donor stewardship and engagement, gift acceptance policies, naming opportunities, board giving policies, et al. Facilitate and drive final policy decision making with Lakewood Foundation President and key leaders.
- Research, recommend and implement donor CRM and stewardship technology in partnership with IT and Finance teams. Build and maintain accurate donor records including prospecting, gift tracking and stewardship activities.
- Partner with Marketing and Community Engagement teams to elevate the Lakewood Foundation presence as part of Lakewood's branding, communications, customer service, and outreach efforts (e.g., website, events, social media, etc.).
- Ensure timely donor recognition, acknowledgments and follow-up.
- Monitor progress toward fundraising goals and provide regular reporting.

Collaboration and Leadership

- Collaborate closely with many functions across Lakewood: Marketing, Community Engagement, Finance and Administration, Family Services, the President, Board members, and others to drive alignment and facilitate decision making.
- While this role does not make final decisions about policies, it is expected to bring best-in-class recommendations across myriad topics to build this function in alignment with Lakewood's vision and strategic priorities.
- Participate in annual and other strategic planning sessions, as needed.

QUALIFICATIONS

Required

- 10+ years of fundraising experience with demonstrated record of cultivating, developing and closing major and planned legacy gifts.
- Bachelor's degree or equivalent combination of education and experience.
- Ability to bring a point of view on philanthropic strategies, best practices and prioritization.
- Ability to create effective, high-quality relationships with excellent interpersonal, written and verbal communication skills.
- Broad knowledge and experience of major and planned giving strategies and tools, and experience raising funds for a campaign.
- Broad knowledge of donor CRMs and proficiency utilizing a CRM to maximize relationship management.
- Willingness and ability to jump into the details and execute.
- Ability to use discretion when handling and communicating sensitive information.

- Ability to work independently and motivate self to achieve success by taking initiative.
- Strong analytical and computer skills: Microsoft Office Suite – Outlook, Word, Excel, OneDrive, Teams.
- Strong focus on audience and end user needs.
- Proven problem solving, organizational and time management skills.
- Highly professional, articulate and polished.
- Ability to work collaboratively and communicate effectively with others.
- Ability to travel to locations in the greater metro area on a frequent basis, partake in some evening and weekend hours for meetings and events.
- Commitment to equity, inclusion, and community-centered practice.

Preferred

- Experience fundraising for higher education, museum, historical society, healthcare, conservation, or other cultural nonprofit.
- CFRE

CULTURAL FIT AT LAKEWOOD

- High level of compassion and integrity; ability to show respect and sensitivity towards families, visitors and other team members. High EQ.
- A proactive "driver" who leads by example and shares passion to inspire others.
- Authentic, driven, curious, and positive.
- Excited by change; thrives in a growth-oriented organization.
- Can express ideas effectively and is an active listener.
- Highly collaborative, team oriented.

WORK SCHEDULE

- Regular office hours are Monday through Friday, 8 AM - 4:30 PM
- Evening, weekends and some holidays, including Memorial Day, are required for meetings and events.
- Some remote work is possible.
- Lakewood promotes reasonable work/life balance and leaves it to the discretion of this employee to maintain appropriate work/life boundaries.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. The employee will work mainly on-site as part of a team in frequent contact with others, with occasional opportunity to work remotely. The work environment is primarily an office setting with a shared workspace or cubicle-style layout. The noise level is generally quiet, with regular phone and in-person interactions throughout the day.

COMPENSATION

Salary range of $120,000 - $160,000, commensurate with experience.
Benefits include:

- 401(k) with 401(k) match
- Health, dental, life and vision insurance
- Flexible spending accounts
- Paid Time Off (PTO)