



## POSITION GUIDE

# SENIOR DIRECTOR OF INDIVIDUAL GIVING



**OPEN SPACE  
INSTITUTE**

## ABOUT OPEN SPACE INSTITUTE

The Open Space Institute (OSI) is a national leader in land protection and creating connections to nature and the outdoors for all people. Over the past five decades, OSI has protected more than 2.3 million at-risk, irreplaceable acres of forests, wetlands, and shorelines across the North American Eastern Seaboard. Expanding in both scope and size, OSI employs entrepreneurial spirit, determination, and expertise to protect the land that matters most – to preserve clean drinking water; improve the public's access to parks, public trails, and greenways; save at-risk wildlife habitat; strengthen communities; and to combat climate change and mitigate its effects. OSI has an operating budget of \$41 million, of which \$32 million is derived through philanthropy, and is engaged in several multi-year campaigns and initiatives to support its mission.

OSI operates a spectrum of programs that advance its mission in a 22-state region across the Eastern Seaboard. These include:

- **Land acquisition and conservation easements:** OSI accomplishes its goal of permanently conserving land and its natural, scenic, and historic resources by accepting land and conservation easements as well as purchasing land for parks and other community assets. These efforts protect unified natural landscapes for the benefit of both wildlife and human life.
- **Park Improvements:** Beyond protecting land for park use, OSI leverages public and private funding to make parks and trails more engaging and welcoming for visitors and fostering the next generation of environmental stewards.
- **Conservation Capital program:** OSI builds partnerships that accelerate the effectiveness of conservation by providing grants and short-term, low-cost bridge loans. By administering grant programs and supporting land trusts, OSI helps its partners safeguard wildlife habitat and clean water while also providing recreational access and bolstering local communities.
- **Conservation Communities program:** OSI offers legal and financial oversight to grassroots community-based organizations, providing technical assistance and grant-eligibility that enables these programs to grow and achieve their missions.

## KEY FACTS



- **\$41.5M** total organizational budget
- **\$31.8M** annual contributions
- **73** total staff
- **25-member** Board of Trustees

## CONNECT WITH OSI



## MISSION



To protect scenic, natural, and historic landscapes to provide public enjoyment, conserve habitat and working lands, and sustain communities.

## VISION



The Open Space Institute will save the lands most important for the well-being of our planet and all living things.

## VALUES



- We promote and value best practices and intellectual leadership in conservation.
- We practice innovation, creativity, flexibility, and entrepreneurialism while managing the risks inherent in our work.
- We work constructively with partners and communities to achieve our collective vision.
- We embrace diversity and recognize the critical demand for equitable access to accomplish the mission of conservation for all people.
- We promote a culture of institutional integrity, collaboration, and honesty, and one that inspires enjoyment and fulfillment in the workplace.

Throughout its fifty-year history, the Open Space Institute has proven to be an innovative and creative problem-solving partner in the land conservation movement. By building deep relationships that sustain communities and providing technical expertise where it's needed most, OSI has established itself as a vital partner in conserving and providing equitable access to critical landscapes.

## THE OPPORTUNITY

Due to rapid programmatic and geographic growth, OSI seeks a skilled and experienced development professional to lead and expand our individual giving program. Reporting to the Senior Vice President of Philanthropy, the newly created Senior Director of Individual Giving role will be responsible for leading efforts to identify, cultivate, solicit, and steward major gift donors and prospects, as well as support the design and launch of a planned giving program. This frontline fundraising position requires experience interacting successfully with major donors, prospects, and board members, as well as senior program staff. The Senior Director of Individual Giving will partner with the SVP of Philanthropy to design and lead the organization's individual giving strategy while also managing a personal portfolio of donors in New York State and additional regions as OSI's work expands across the Eastern United States.

## MAJOR OBJECTIVES

Within the first 12 months, the Senior Director of Individual Giving will achieve the following major objectives:

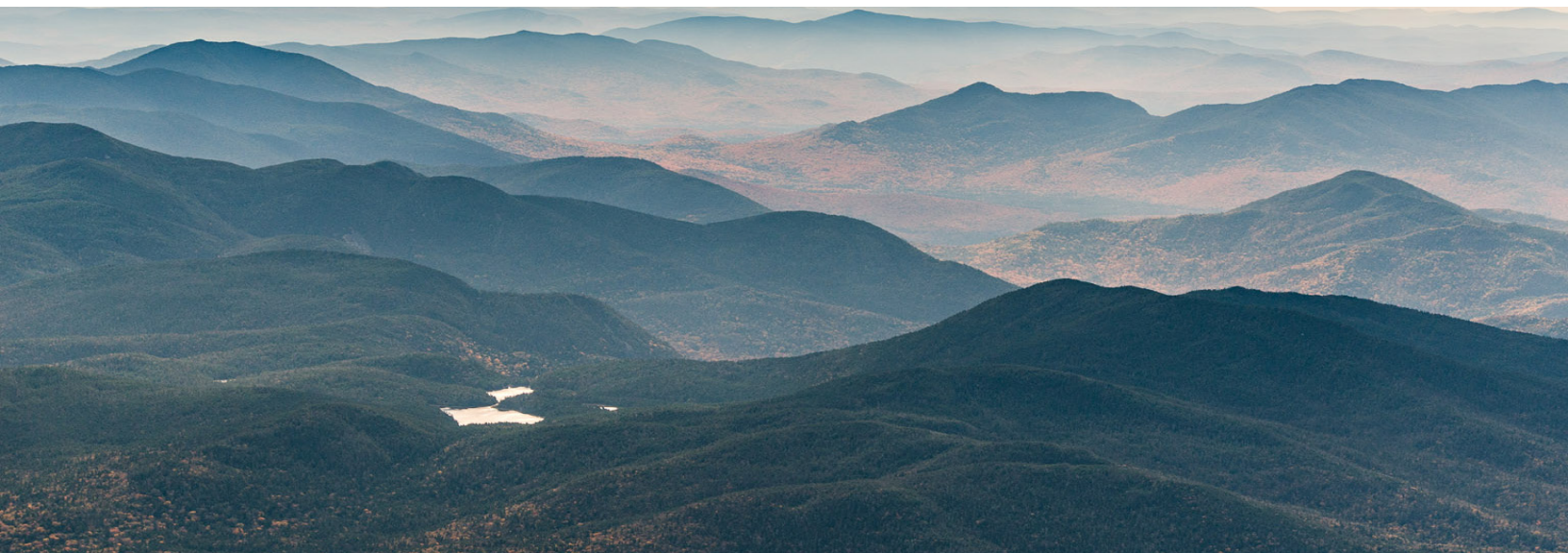
- In partnership with the SVP of Philanthropy, establish an ambitious, strategic plan for individual giving that is aligned with larger organizational goals; charts a plan for significant growth in major, principal, and leadership giving towards OSI, including planned and blended gifts; and helps to cultivate a culture of philanthropy across the organization.
- Develop a moves management system and designated donor portfolios that ensure coordinated donor cultivation; establish clear, measurable, metric-based goals and financial targets for individual giving.
- Bring existing individual donors to a higher level of stewardship and engagement while also identifying new donors and prospects.
- Alongside the SVP of Philanthropy, increase the engagement of Board members in fundraising activities.

## RESPONSIBILITIES

The Senior Director of Individual giving will have the following primary responsibilities:

### LEADERSHIP AND MANAGEMENT

- Implement the strategy for a growing individual giving program as part of the overall philanthropy effort for OSI.
- Work in close partnership with the SVP of Philanthropy, development team, and program staff to develop overall individual giving strategy; support the executive team and Board of Trustees, as needed.
- Lead, manage, and mentor an Individual Giving Officer (IGO) and share oversight of Development Associates; support their professional development.







- Work with SVP of Philanthropy and IGO to oversee OSI's individual giving portfolio—establishing best practices, employing moves management, creating tailored strategies for maximizing individual donor engagement, and expanding the use of the donor database, creating a platform for sustained increased giving.
- Set, manage, and analyze short-term and long-term metrics on major, leadership, and principal gift fundraising activities, including implementation of a progress reporting system and ensuring tracking and reporting in OSI's donor database.
- Persuasively convey OSI's mission and programs through written proposals, brochures, reports, letters, and other correspondence.
- Oversee development of prospect research and briefings for all major gift level+ individual donors and prospects.
- Partner with SVP of Philanthropy to foster and maintain programmatic relationships within the organization to identify the opportunities for individual support and maximize donor engagement.
- Partner with SVP of Philanthropy to create and launch new planned giving program.

#### DONOR DEVELOPMENT

- Personally manage a balanced portfolio of 30-50 major gift level donors and prospects, securing five- and six-figure+ commitments:
  - Successfully identify, qualify, and cultivate existing and new donors for project-specific; annual, planned, and blended gift; and multi-year support.
  - Develop and implement efforts to raise the level of commitment among OSI's existing donor base.
  - Develop and maintain communication and outreach plans to retain and steward donors and move them along the giving continuum.
- Provide support to executive team, SVP of Philanthropy, and program colleagues in preparing for and/or participating in cultivation visits, briefings, and solicitations of high-level donors and prospects.
- Act as an OSI representative and spokesperson and effectively network in various venues and in front of a wide range of audiences.

#### QUALIFICATIONS

The ideal candidate will possess most of the following qualifications:

##### EXPERIENCE

- A bachelor's degree or equivalent relevant experience and a minimum of seven years of professional fundraising experience, with a focus on major gifts, individual giving, and moves management; a commitment to best fundraising practices.
- Enthusiastic passion for OSI's mission, vision, and values; knowledge of conservation issues or experience fundraising in support of environmental issues is preferred.
- Ability to develop and implement a sound strategic annual fundraising plan to increase OSI's individual giving revenue.

- Record of working with individual donors, building existing relationships and growing new ones, and successfully managing a donor portfolio.
- Proven track record of raising funds from individuals with experience closing five- and six-figure+ gifts.
- Previous experience successfully managing frontline fundraisers to meet their individual and team goals.
- Awareness of donor prospect management methods and software; experience in managing and tracking multiple prospects and donors.
- Capacity to develop new and creative approaches to increase donor base and giving with particular attention to major donors.
- Knowledge of and experience in planned giving and blended giving would be a plus.

### CHARACTERISTICS

- Strong leadership and team building skills, the ability to manage staff to maximize performance, and the capacity to provide necessary support and mentorship to develop staff members as professionals.
- Flexibility and a willingness to listen, learn, be adaptable, and build healthy relationships with cross-functional teams.
- Strong interpersonal, written, and oral communication skills.
- Ability to quickly synthesize complex information.
- An entrepreneurial mindset with an orientation towards systems-building.
- Commitment to ethical fundraising and handling confidential information with integrity and sensitivity.
- Excellent interpersonal skills required to relate to donors, staff, and colleagues.
- Self-motivated with strong work ethic and ability to work with considerable independence within the context of a team environment and a network of relationships.
- Demonstrated ability to coordinate strategies in a decentralized environment.
- Strong organizational skills, attention to detail, high level of creativity and initiative, results-oriented, and ability to handle deadlines and shifting priorities with good judgement.
- The analytic acumen to interpret financial information and manage data.
- Excellent computer skills (MS Office programs) and comfort with donor databases (Raiser's Edge a plus).

This position requires a valid driver's license and may include a review of the prospective employee's motor vehicle record.

*Please note: If you do not wholly meet the above qualifications but believe you are otherwise well-suited to meet the needs of this position, we encourage you to apply.*

### THE LOCATION

The position can be based in OSI's New York City, Beacon, NY, or Albany, NY offices and will require travel or out of office work directly with donors as needed (25-35%) primarily in the Hudson Valley, NY-metro area, with occasional travel within the northeastern and southeastern United States.

Hybrid work arrangement with four days in office expected weekly, when not on donor visits.







## COMPENSATION & BENEFITS

The salary range for this position is \$152,000-161,000. OSI offers a comprehensive benefits package that includes generous paid time off (including PTO, holidays, sick time, and summer Fridays); medical, dental, and vision insurance; 403(b) retirement plan with employer match; long- and short-term disability and group life insurance; employee assistance program; health advocate; and commuter benefits.

## APPLICATION

OSI has retained Campbell & Company to conduct this search. The team for this project includes Joey Scheiber, Abigail Husain, and Kris McFeely.



**JOEY SCHEIBER**

*Senior Consultant, Executive Search*



**ABIGAIL HUSAIN**

*Associate Consultant, Executive Search*



**KRIS MCFEELY**

*Managing Director, Executive Search*

**APPLY NOW >**

*Open Space Institute, Inc. ("OSI") is an Equal Opportunity Employer and is committed to complying with all federal, state and local equal employment opportunity ("EEO") laws. OSI prohibits discrimination against employees and applicants for employment because of the individual's race or color, religion or creed, alienage or citizenship status, sex (including pregnancy), national origin, age, sexual orientation, gender identity or expression, disability, marital status, familial status, domestic partnership status, genetic information or predisposing genetic characteristics, military status, domestic violence victim status, arrest or pre-employment conviction record, criminal history, sexual and reproductive health choices, height, weight, or any other characteristic protected by law. OSI also considers for employment qualified applicants with criminal histories consistent with federal, state, and local law. This EEO Policy applies to all OSI's activities, including, but not limited to, recruitment, hiring, compensation, assignment, training, promotion, performance evaluation, discipline and discharge. As detailed below, this EEO Policy also bans discriminatory harassment.*

*OSI allows all individuals to use the single-sex bathroom facilities consistent with their gender identity or expression.*



Campbell & Company is a national nonprofit consulting firm that helps organizations create greater impact through executive search, fundraising, communications, and strategic information services. Campbell & Company has helped place exceptional leaders in all sectors, including human services, arts & culture, education, healthcare, environment, associations and membership organizations, and civic and public affairs.

Underlying all our work is a shared focus on the Campbell & Company mission: to collaborate and innovate with people who change lives through philanthropic vision and action.

Visit us at [campbellcompany.com](https://campbellcompany.com) and connect with us on [LinkedIn](#), [Twitter](#), [Facebook](#), and [Instagram](#).