CAMPBELL & COMPANY

POSITION GUIDE

# VICE PRESIDENT OF INSTITUTIONAL 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 Vice President of Institutional Giving to serve as a key member of the development team's leadership. Reporting to the Senior Vice President of Philanthropy, the newly created VP of Institutional Giving role ensures that OSI maintains and deepens donor relations while forging new relationships to build visibility, impact, and financial resources. In partnership with the SVP and program leads, the VP of Institutional Giving is responsible for overseeing all institutional fundraising activities, including foundations, corporations, and government/public partners to meet annual and other fundraising goals. The position requires the ability to communicate OSI's mission in clear, compelling terms that will inspire donors to invest in the organization's critical conservation and open space access work.

## MAJOR OBJECTIVES

Within the first 12 months, the Vice President of Institutional Giving will achieve the following major objectives:

- Establish trusting relationships with existing institutional funders to maintain giving levels; begin cultivating existing funders to increase giving and prioritizing the cultivation of new funders.
- Develop familiarity with OSI programs and build relationships with internal program staff in order to articulate a compelling case for funders.
- In partnership with the SVP, develop a three-year plan for the institutional giving portfolio and team that builds on past successes while creating a more sustainable structure to achieve future goals.
- Ensure a collaborative, productive, and positive culture within the institutional giving team and participate in fostering that same culture across the development department and organization.

## RESPONSIBILITIES

The Vice President of Institutional Giving will have the following primary responsibilities:

### LEADERSHIP AND MANAGEMENT

- Establish and implement the strategy to grow an institutional funding target currently totaling just over $27M annually with projected expansion in both the number of institutional partners and total revenue over the next three years.
- Work in close partnership with the SVP, development team, and program staff to develop overall institutional giving strategy; support the executive team and Board of Trustees, as needed.
- Lead and manage a team of three dedicated institutional funding professionals and share oversight of development associates; support the professional development of the institutional giving team.

- Work with SVP and institutional giving team to oversee OSI's institutional funding portfolio, establishing best practices, developing and managing balanced portfolios for institutional giving team, and creating tailored strategies for maximizing institutional partner engagement.
- Set, manage, and analyze short-term and long-term metrics on institutional giving activities, including ensuring accurate tracking and reporting in OSI's donor database (Raiser's Edge).
- Persuasively convey OSI's mission and programs through written proposals, reports, letters, and other correspondence; oversee development of tailored pitch, proposal, and report materials for all institutional funders and prospects.
- Oversee the institutional giving team to ensure best-in-class grants management, accounting, compliance, and stewardship:
    - Continuous monitoring of grant progress and reporting requirements.
    - Collaborate with the OSI finance department on grant-related budgets and revenue forecasts.
    - Manage donor-facing grant-related program and campaign budgets.
    - Develop interim and final grant reports with project progress and accounting.
    - Manage gift acknowledgements and proactive communication with funding partners throughout the life cycle of a grant.
- Oversee development of prospect research, decks, and briefings for institutional donors and prospects in preparation for meetings or funding approaches.
- Ensure that programmatic commitments, OSI policies and procedures, financial standards, and legal requirements are met and managed for ethical compliance.
- Partner with the SVP to foster and maintain programmatic relationships within the organization to identify opportunities for institutional support and maximize funding partner engagement.
- Monitor institutional giving trends in the field of land conservation and in the nonprofit sector to help position OSI ahead of major funding changes or trends.

## DIRECT FUNDRAISING

- Personally manage a portfolio of principal and leadership level institutional funders and prospects, securing six- and seven-figure commitments:
    - Successfully identify and cultivate existing and new prospects for project-specific, annual, and multi-year support.
    - Develop and implement efforts to raise the level of commitment among OSI's existing institutional funding partners.
    - Organize and attend meetings, presentations, and calls with funders and prospects.
    - Develop strategy for and oversee preparation of proposals, solicitations, reports, budgets, and supporting materials.
    - Provide high-level, strategic stewardship of funding relationships.
- Oversee the solicitation of and/or coordinate any participation by institutional funders in OSI events, especially the annual gala.
- Provide support to the executive team, SVP, and program colleagues in preparing for and/or participating in meetings with institutional funders 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

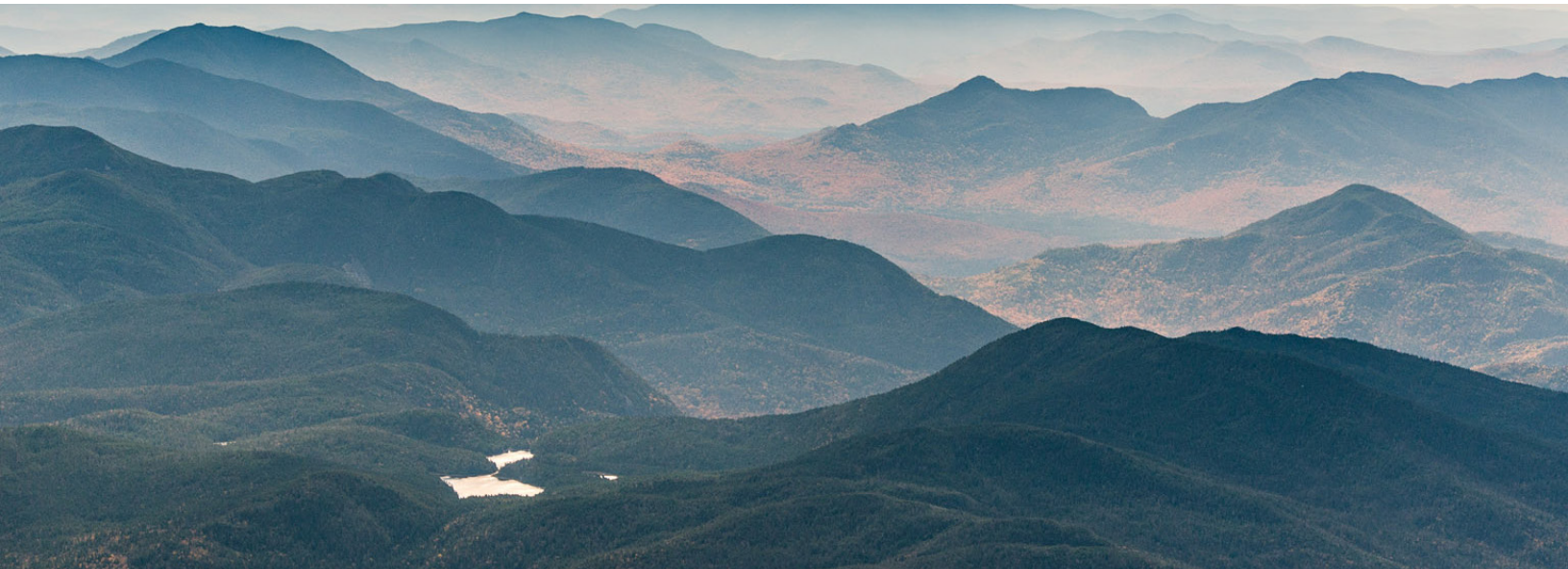
- A bachelor's degree or equivalent experience and a minimum of fifteen years of institutional fundraising experience is required.
- Commitment to OSI's mission, vision, and values. Knowledge of conservation issues or experience fundraising in support of environmental issues is preferred.
- Demonstrated success managing and forging relationships with multiple, complex fundraising sources simultaneously.
- Ability to develop and implement a sound strategic institutional giving plan.
- Proven track record of raising funds from institutional funders at seven-figure levels, especially foundation and government funders.
- Experience leading an institutional giving department generating $20M+ annually is strongly preferred.
- Previous experience successfully managing a fundraising team; ability to manage and develop staff to maximize performance and build healthy relationships with cross-functional teams.

### CHARACTERISTICS

- Strong leadership and team building skills; the ability to mentor and develop a team.
- Understanding of how to lead growth and systems change; entrepreneurial and creative; a skilled planner.
- Commitment to ethical fundraising and handling confidential donor information with integrity, confidentiality, and sensitivity.
- Excellent communication skills, both written and oral; ability to influence and engage a wide range of donors and build long-term relationships.
- Flexible and adaptable style; a leader who can positively impact both strategic and tactical fundraising initiatives.
- Self-motivated with a strong work ethic and able to work with considerable independence within the context of a team environment and a network of relationships.
- Strong organizational skills, attention to detail, high level of creativity and initiative, results-oriented and ability to handle deadlines and shifting priorities with good judgment.
- Financial acumen with experience planning and delivering budgetary responsibilities; analytical ability 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.*



## 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 (10-20%) 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 $182,000 to $194,000. 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 Colleen Rogers, Joey Scheiber, and Kris McFeely.

**COLLEEN ROGERS**
*Vice President, Executive Search*

**JOEY SCHEIBER**
*Senior Consultant, Executive Search*

**KRIS MCFEELY**
*Managing Director, Executive Search*

**APPLY NOW >**

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*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.*

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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 and connect with us on LinkedIn, Twitter, Facebook, and Instagram.