

**The MONY Group**  
**DESCRIPTION OF RESPONSIBILITIES AS**  
**DIRECTOR, CORPORATE SOCIAL POLICY**

**THE MONY GROUP AND THE MONY FOUNDATION**

As an insurer, investor, and employer, The MONY Group believes that the health and future of the Company are directly related to the health and future of the communities it serves. As a concerned corporate citizen, The MONY Group believes that its philanthropic and business endeavors are both valuable investments in the development of those communities.

The MONY Foundation seeks to apply available resources in specific, well-defined areas of the philanthropic community. At present our philanthropic efforts are concentrated at our Home Office in New York City, and in Syracuse, NY. In addition, the MONY Foundation partners with our Sales Offices nationwide.

**OBJECTIVE AND GENERAL PURPOSE OF POSITION**

Through strategic planning and analysis and the collection of information and data on trends in corporate philanthropy, to ensure the continued success and expansion of MONY's community-based corporate responsibility programs, Field Grant Program, and Foundation and corporate philanthropic activities, while proposing and creating new and innovative methods of ensuring The MONY Group's continued position as a forerunner in corporate philanthropy.

**RESPONSIBILITIES**

Make grants concurrent with the Foundation's site-specific focuses in New York City and Syracuse.

- Coordinate RFP's or announcements of grant cycles to potential applicants.
- Review and assess all proposals submitted/analyze audited financials and IRS 990 forms.
- Conduct site visits, as required to analyze non-profit program provision.
- Create grant summaries for submission to the Syracuse and New York City grants committees.
- Coordinate and staff all grant committee meetings.
- Present grant recommendations to committees.
- Maintain grantee files and paperwork, including develop and maintain grants database.
- Communicate with all grantees on behalf of the Foundation; distribute information/guidelines upon request to interested applicants.
- Create publicity/raise awareness with internal/external public.

Manage all aspects of the national Field Grant Program, including:

- Inform Financial Professionals/Managing Directors of Field Grant Program in a strategic and ongoing manner.
- Assess all Field Grant proposals submitted to The MONY Group/analyze audited financials and IRS 990 forms.
- Advise FPs/MDs and respective nonprofit organizations regarding submission of proposals by The MONY Group Financial Professionals. Coordinate submission.
- Create Field Grant summaries for submission to Field Grant Committee.
- Coordinate and staff Field Grant Committee meetings.
- Present grant recommendations to committee.
- Ensure compliance to Field Grant funding criteria by Financial Professionals/Managing Directors.
- Create publicity with internal/external public.

- Create Field Grant reports

Research and coordinate special projects as needed, including:

- Analysis of trends and developments in corporate philanthropy, with particular focus upon issues relating to Foundation focus areas.
- Develop and implement employee volunteerism program, including analyzing a comprehensive survey regarding employee interests.
- Provide staff support regarding MONY's response to the events of September 11<sup>th</sup>.
- Responding to philanthropic requests from senior management

Coordinate all functions related to annual MONY Group / Harlem Junior Tennis fundraising, including:

- Management of fundraising solicitation process.
- Coordination of the accounting systems for the fundraising endeavor.
- Development and coordination of all communications with the Harlem Junior Tennis Program Board, corporate sponsors and individual donors.
- Staffing of HJT Board/MONY Group meetings.
- Creation and distribution of all financial documents, reports or updates related to fundraising.
- Strategic analysis of The MONY Group's relationship with the Harlem Junior Tennis Program, and the development and presentation of a comprehensive proposal regarding the future direction of The MONY Group's involvement with the Program.

#### **PROFESSIONAL KNOWLEDGE**

- Extensive professional experience with corporate strategic giving programs
- Extensive professional experience with not-for-profit agencies.
- Ability to develop and maintain database and spreadsheet programs.
- Experience in the planning of special events.
- Knowledge of basic accounting principles.
- Comprehensive knowledge of computer software, including: Microsoft Access, Lotus Notes, Microsoft Excel and Word.

#### **PROFESSIONAL SKILLS**

- Ability to manage and prioritize many programs and activities simultaneously.
- Ability to work productively under pressure.
- Ability to cultivate and encourage teamwork.
- Ability to work with senior management.
- Ability to supervise student interns.
- Must be a self-starter, highly motivated, ethical and hard worker.
- Must be detail oriented.

#### **COMMUNICATION SKILLS**

- Must have excellent writing skills.
- Must have ability to work effectively with people of widely varying personalities, skills and backgrounds.
- Must have the ability to communicate effectively within a corporate structure, while also having the ability to communicate with social service personnel in an effective manner.

## PROFESSIONAL QUALIFICATIONS

- MA in Education Policy or related field.
- Experience in philanthropic giving activities.