

THE MONY GROUP
DESCRIPTION OF RESPONSIBILITIES
VICE PRESIDENT, CORPORATE SOCIAL POLICY
PRESIDENT, MONY FOUNDATION

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, social investments, 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. Align strategy strongly with MONY's Business Units and Subsidiaries.

RESPONSIBILITIES

Position The MONY Group as a national leader in corporate philanthropy.

- Develop and administer all policies and procedures relating to strategic grantmaking involving all contributions (company and MONY Foundation) and matching gifts. Budget \$1,300,000/year.
- Implement strategic plan.
- Supervise staff in their grantmaking/United Way/matching gift responsibilities (staff comprises 2 full-time, interns, part-time).
- Develop and administer \$1,000,000 Social Investment program through coordination with MONY Investment Department. Implement strategy as it pertains to low income housing.
- Provide leadership for company-wide United Way campaign. Select and train Site Chairs each year.
- Provide leadership for all Grant Committees (NYC, Syracuse, Field) and train all members. Chair all meetings (5 meetings per year).
- Implement corporate art donation to selected non-profits for maximum visibility.

Represent MONY Foundation/Corporate Contributions program to external and internal publics.

- Communicate and present to MONY's Board of Directors on all issues related to Corporate Social Policy.
- Consistently make presentations to external audiences related to MONY's strategic philanthropy (4-5 presentations per year to Conference Board, Public Affairs Council, Council of Foundations). Seen as national expert.

- Consistently make presentations at Campus School and to Tier 3 & Tier 4 financial professionals to encourage their participation and partnership utilizing MONY's Field Grant program.

Implement initiatives for Senior Management involvement in non-profit arena.

- Work with MONY's Board, CEO, President, Chief Investment Officer and CFO to maximize the company's image externally and internally. Research areas such as social reform and community development and brief senior management.
- Advise Senior Management on all policy issues relation to Foundation focus, children, United Way, Matching Gifts or any requested issues of concern to corporation
- Place all Senior Management on a non-profit board and staff their involvement in that board. Train non-profits of our expectation of said board placement. Manage 2003 Baruch College fundraiser.
- Seek out opportunities for Senior Management's participation in key initiatives which will raise MONY's visibility. Work with Communications and PR to train.

Design, implement and manage MONY's "Partners for Leadership" training institute for NYC and Syracuse school principals

- Provide in-depth, proactive management training for 20 NYC and 70 Syracuse principals utilizing internal MONY experts, Board of Education experts or consultants.
- Provide once per month (total 10 sessions per year per group) professional development sessions in each geographic location.
- Liaise with Syracuse City School Superintendent and NYC Board of Education Superintendents, Bank Street College of Education and Educational Consultants to develop, recruit and execute all facets of program.

Develop Strategic Plan for involvement and coordination of philanthropic activities of MONY's subsidiaries and distribution channels.

- Work with new business units to offer team building volunteer projects
- Work with Trusted Advisors to implement a new philanthropic giving program.
- Work with Advest, Lebenthal, USFL and Matrix to assess overlaps of philanthropy.
- Develop opportunities for Tier 3 and Tier 4 Financial Professionals to offer philanthropic advisory services to high net worth clients through Foundations, Donor Advised Funds and direct giving.

Implement Corporate/Client Entertainment Vehicles

- Manage all aspects of MONY NYS Open Golf tournament including contract and event planning for 80 clients
- Manage all aspects of 2002 MONY US Open Golf participation and US Open Tennis participation

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.
- Provide leadership regarding MONY's response to the events of September 11th.
- Responding to philanthropic requests from senior management/MONY's Board
- Provide leadership in issues management for corporation
- Provide leadership in implementing comprehensive proposal as to future directions of The MONY Group involvement with Harlem Junior Tennis.
- Work on company-wide interdisciplinary teams related to internal reorganization (2001) and AXA transaction (2003).

PROFESSIONAL KNOWLEDGE

- Extensive professional experience with corporate strategic giving programs
- Extensive professional experience with not-for-profit agencies/schools/government

- Experience in the planning of special events.
- Knowledge of accounting principles/budgeting/systems

PROFESSIONAL SKILLS

- Ability to manage staff/student interns.
- Ability to manage and prioritize many programs and activities simultaneously.
- Ability to work productively under pressure.
- Ability to cultivate and encourage teamwork with direct staff and throughout corporation
- Ability to liaise with expert skills with external publics (government, school, non-profit and political entities)
- Ability to work with senior management and influence appropriately
- Ability to work with MONY's Board of Directors
- Ability to take risks, think creatively and be proactive with departments within MONY
- 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.
- Public speaking skills necessary for expert presentations on corporate strategic giving

PROFESSIONAL QUALIFICATIONS

- Masters in Social Work, Public Policy, or related field.
- 8-10 years experience in leading philanthropic giving activities.