



Philanthropic Advisor

Irvine, CA

<https://www.oc-cf.org/philanthropic-advisor/>

Description

ABOUT ORANGE COUNTY COMMUNITY FOUNDATION:

The Orange County Community Foundation combines giving strategy, community intelligence, enduring relationships, and heartfelt intention to amplify the power of giving and its profound result: greater good in Orange County, and beyond. We serve as a resource for individual and family philanthropists, facilitate grant and scholarship programs, and lead community-based initiatives. We inspire giving and connect people and resources to create sustainable impact, granting more than \$1 billion since 1989 in Orange County, across the country, and around the world. OCCF's team is an innovative, mission-driven group focused on recognizing promise, convening key players, and applying our unique capabilities to create momentum for good, together. As trusted strategic advisors, we promote stronger connections, encourage generosity, and provide exactly what is needed to fuel growth and guide good. We are tenaciously committed to ensuring that our donors, nonprofit partners, and beneficiaries feel truly understood. Deeply listening, investing time and energy conducting rigorous research, and fostering close personal relationships is how we cultivate understanding at every step. Our mission is to transform our community's heartfelt intention into greater impact for good.

Overview of Position

Reporting to the Director of the Center for Engaged Philanthropy, the Philanthropic Advisor provides high-quality stewardship and advisory services to OCCF donors, managing relationships with a portfolio of donor-advised fund holders to facilitate their grantmaking

and deepen their engagement with philanthropy and OCCF. This includes providing responsive grantmaking support and enriching learning opportunities and responding to special requests that help donors achieve their philanthropic goals. Services also include creating family giving plans, multi-generational family engagement activities, coordinating nonprofit site visits and donor meetings, and administration of custom grant programs.

Main Duties and Responsibilities

Donor Engagement and Stewardship

- Manage a portfolio of donor advised funds delivering high-quality, proactive, and personalized advising services while fostering trusted relationships with donor advisors.
- Develop donor engagement and stewardship plans and supports donors when accomplishing their short-term objectives and long-term goals.
- Develop legacy guidelines for donor advised funds.
- Identify donors' philanthropic goals and priorities, provide timely and thoughtful responses to inquiries, and cultivate strong relationships through proactive engagement and support.
- Facilitate donor meetings and multi-generational family engagement activities.
- Track donor engagement activities in Salesforce database.
- Facilitate responses to donor inquiries, concerns, and strengthen current donor relationships.
- Review donor-advised grant requests and enter them into Salesforce, approve once processed while ensuring proper due diligence and necessary follow-up.
- Conduct nonprofit research to support strategic philanthropic planning and granting inquiries.
- Provide guidance and support on administration and design of grant programs for Signature Funds, including defining program goals and objectives, creating a request for proposals, soliciting eligible nonprofit applicants, reviewing proposals, facilitating grant review committees, notifying awardees, negotiating grant agreements, and coordinating distribution of grants to nonprofits. Oversee the reporting process, including tracking nonprofit progress and summarizing outcomes and impact for donors and OCCF.
- Educate donors on opportunities to become better engaged with OCCF's Community Impact work, including contributing to pooled granting funds.

- Support the implementation of educational programs to enhance the donor stewardship model and increase awareness of important and emerging needs in the community, including donor education events, site visits and donor convenings.
- Support the planning and implementation for special outreach programs and events. This may include but is not limited to our Family Volunteer Program, Next Generation programs, Family Facilitation and any new opportunities for donor engagement.

Community Engagement

- Maintain a broad understanding of the Orange County community and use this knowledge to build and maintain relationships with donors and potential donors.
- Conduct research on issues or concerns of importance to OCCF through reviewing written materials, attending community meetings, and interviewing community stakeholders, and present those findings in written and/or oral formats.
- Conduct site visits to nonprofit organizations in Orange County to stay connected with the needs in the community and be able to communicate those needs to donors.
- Represent the Foundation at community events and activities, including making presentations on OCCF's behalf.
- Administrative
- Work cross-functionally with Philanthropic Strategy, Marketing and Communications, Finance and Administration Departments.
- Maintain detailed donor, fund, nonprofit, and grant records in OCCF Salesforce database.
- Assist the Director of Center for Engaged Philanthropy with special projects as requested.
- Work collaboratively across Donor & Community Engagement teams with special projects and programs as requested.
- Performs other duties as assigned.

Compensation & Benefits

The ability to work for an organization with a phenomenal mission, positive team-oriented work environment, a competitive annual salary range - \$80,000 - \$85,000 (Exempt) and will be commensurate with experience as well as incredible benefits including Medical, Dental & Vision, 403(b) retirement plan with an automatic contribution by the organization,

2 weeks of vacation, 2 weeks of PSL, 10 annual paid holidays and the opportunity for a 9/80 work schedule. The position will have the opportunity to work from home one day per week.

Review of applications, nominations, and expressions of interest will begin immediately and continue on a confidential basis until an appointment is made. The deadline to apply is August 22, 2025. However, the position may close when an adequate number of qualified applications are received.

Orange County Community Foundation provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

Requirements

Minimum Qualifications:

Education

Bachelor's degree in related field required

Experience

Four to six years of experience in donor relations, community outreach, or a related field.

Effective and persuasive verbal and written communication style.

Ability to develop and maintain positive interpersonal relationships.

Superior organization and time management skills.

Strong donor stewardship skills and commitment to quality and results.

Ability to work successfully with diverse individuals with a variety of work and communication styles, both internally and externally.

Strong presentation skills, with demonstrated ability to facilitate discussion across multiple audiences.

Strong customer service skills with the ability to handle sensitive and confidential information appropriately.

Strong interpersonal skills to foster a collaborative work environment, facilitate open communication, and support cross-departmental coordination.

Responsiveness and ability to prioritize and work accurately to meet multiple deadlines in a fast-paced environment and adjust to changing and/or tight deadlines.

Team player who is also a self-starter needing minimum supervision.

Business technology skills, including the ability to operate business machines and adeptness with a number of computer software applications, including MS Office products. Experience with constituent database systems a plus.

Demonstrated success working with multi-generational families leading and facilitating discussions about values, charitable giving, and community impact a plus.

Ability to think strategically.

Creative problem-solving skills.

Salary Description

80,000 - 85,000