

Community Foundation of Sarasota County

Job Profile

Date: 7/1/24
Reports to: Vice President, Philanthropy
Supervises: N/A
FLSA Status: Exempt

Purpose:

The Philanthropic Advisor develops trusted, long term relationships with existing donors, prospective donors, financial advisors, and the community at large, helping to align philanthropic intentions with charitable giving opportunities available through the Community Foundation of Sarasota County.

Responsibilities/Essential Functions:

- Identify, cultivate, solicit, and steward a portfolio of prospects, donors, and professional advisors to further their relationships with CFSC and to ensure personalized outreach.
- Lead, plan, implement and continually refine meetings, events, services, programs, projects and products that meaningfully engage donors in their philanthropy, with CFSC, and with each other in ways that maximize resources and expertise to meet community needs.
- Represent CFSC at on-site and off-site social events and related events before and after regular business hours, weekdays and weekends.
- Cultivate relationships with community organizations, institutions and associations to position CFSC as the premier community-based center for philanthropy.
- Maintain portfolio management responsibilities for donor advised and other funds as assigned, assisting donors in the furthering of their charitable goals, generating additional contributions to funds and referrals to other prospective donors.
- Utilize Foundation database (FIMS) to track and record relationships, build donor profiles, and research donor interests and giving patterns.
- Prepare (and present) presentations, in collaboration with colleagues, for prospective donors and financial advisors, as needed.
- Participate in cross-departmental discussions to ensure provide optimal donor support.
- Serve as CFSC liaison to Giving Circles, if needed.
- Other duties as assigned, based on business needs.

Position Qualifications:

- Bachelor's degree. A combination of related experience and education *may* substitute for degree.
- 5 years in planned giving (i.e, cultivating, soliciting, closing planned and/or major gifts) or related roles in development and/or marketing.
- Highly organized, detail-oriented, flexible; solution-oriented, problem solver.
- Proficient at public speaking.
- Highly developed written and verbal communication skills; able to maintain positive relationships through active listening.
- General knowledge of investments and the financial services industry; able to effectively communicate technical content (financial, programmatic, investment-related) to donors and prospects.
- Proficiency with Microsoft Office Suite; moderate to advanced Word, Excel and PowerPoint skills.
- Foundation-specific software or other database experience helpful.
- Able to self-support for basic computer and network problems.

Enabling/Behavioral Competencies (Level 4)

Customer Service (internal and external relationships)

- Negotiates with stakeholders to set and manage service expectations.
- Manages conflicting stakeholder requests.
- Resolves complex issues/problems.

Business Awareness

- Applies knowledge of industry and financial, strategic and technological capability of the organization to individual and team responsibilities.
- Determines economic impact and critical success factors related to business decisions.

Change Navigation

- Understands and clarifies how change will help organization meet goals.
- Develops work plans sensitive to change absorption of all stakeholders.
- Applies systemic thinking to multiple change initiatives.

Communication

- Shares a common, strategic vision; supportive of initiatives and finds ways to turn challenges into 'wins'.
- Establishes effective processes and practices for knowledge sharing and communication.
- Influences others using fact-based methodology and business insight.

Leadership (development of self and others)

- Leads by example; sets & communicates high expectations; motivates self and others to achieve goals.
- Recognizes others' contributions & shares credit for success.
- Interprets how the business strategy links to individual roles and responsibilities.

Teamwork

- Initiates and leads activities to support business objectives.
- Develops and directs plans for improving team performance or carrying out strategic initiatives.
- Manages cross-functional teams or projects.
- Networks to build internal and external alliances.

Priority/Work Management

- Leads process improvement efforts, assessing tasks and expected outcomes, applying innovative problem-solving techniques.
- Directs/leads multiple resources and complex projects and/or guides others in project planning and management.
- Identifies and negotiates projects/issues that may impact multiple entities.

Innovation/Creativity

- Anticipates industry or competitor trends to develop internal strategic business objectives.
- Recommends products/ services/programs relationships based on competitive research.
- Ensures cross-functional understanding of (and adherence to) business or strategic plans.