

Be The One



The Community Foundation of Sarasota County has an opening for:

Philanthropic Advisor

The Philanthropic Advisor is responsible for developing and furthering relationships with the Community Foundation of Sarasota County through existing donors, prospective donors, financial advisors, and the community at large. The primary focus will be relationship building and solicitation necessary to reach the organization's goals.

This is a full-time position with excellent benefits including employer paid health, dental, vision, short and long term disability and life insurance for employees, in addition to a generous Paid Time Off policy, a 401K with matching opportunities and more!

Essential Functions:

1. Identifies, cultivates, solicits, and stewards a portfolio of prospects, donors, and financial advisors to ensure personalized outreach.
2. Leads, plans, implements, and continually refines meetings, events, services, programs, projects, and products that work to meaningfully engage donors in their philanthropy, with the Foundation, and with each other in ways that will maximize resources and expertise to meet community needs.
3. Regularly represents CFSC at scheduled on-site and off-site social events and other related events before and after regular business hours on the weekdays and weekends.
4. Utilizes the FIMS database to track and record relationships, builds donor profiles, and/or researches donor interests and giving patterns.
5. Makes presentations to prospective donors, financial advisors, and community groups, as needed.
6. Works with existing donors to grow their fund and/or create a future fund.
7. Assists with development of policies and guidelines relating to donors and fund development.
8. Works collaboratively with other CFSC team members to provide optimal donor support.

Expected Outputs:

1. Manages a portfolio of prospective and current donors to include financial advisors, in accordance with goals set with supervisor.
2. Generates new donor funds on an annual basis, in accordance with goals set with supervisor.
3. Tracks all relationship touches in the FIMS database system.
4. Leads donor engagement sessions.

Position Qualifications:

1. Bachelor's degree required, CFRE designation preferred. A combination of related experience and education may substitute for degree.



2. Minimum of 3 years experience in development, sales, or marketing with an emphasis on providing service to high net worth individuals. Knowledge of the local philanthropic community and working in a nonprofit environment is helpful.
3. Proven experience in fundraising, including face-to-face solicitations, and public speaking
4. Highly developed written and verbal communication skills, including highly developed relationship-building and listening skills (i.e., ability to easily connect and form long-term relationships).
5. Excellent organizational, prioritization, follow-through and attention to detail skills.
6. Effective problem solving and trouble-shooting skills.
7. General knowledge of investments and the financial services industry; able to effectively synthesize and translate technical content (financial, programmatic, investment-related) to donors and prospects.

Technology Qualifications:

1. Proficient with Microsoft Office Suite, moderate to advanced skills in Word, EXCEL and PowerPoint.
2. FIMS software knowledge or other comparable donor database software. Ability to become proficient with FIMS software within 90 days of hire.
3. Ability to self-support for basic computer and network problems.

General Performance Standards and Expectations:

In addition to satisfactory performance on all the essential job duties and responsibilities for this job, the Community Foundation of Sarasota County employees are will strive to demonstrate our service philosophy of P.R.I.D.E in excellence to our internal and external constituents.

Purposeful Worker-

- Goal Oriented
- Gets job done within deadlines
- Self-Motivated
- Takes Ownership
- Accountable
- Maintains required technical skills
- Calm under stress

Respect-

- Respect for importance of everyone
- Empathetic Listener
- Ask and listen
- Provides excellent customer service, both internal & external
- Demonstrates qualities of a Servant Leader
- Under promises and over delivers
- Authentic, honest, genuine

Inspirational-



- Curious about new information
- Creative, independent thinker
- Problem solver – thinks outside the box
- Continuous learner

Dedicated Team Player-

- Works well across disciplines
- Adaptable to change
- Listens to other's ideas
- Accepts different assignments

Enthusiastic-

- Excited about the CFSC mission
- Optimistic, positive attitude

About This Opportunity:

The Community Foundation of Sarasota County has been named one of the *2019 Best Places to Work in Sarasota-Manatee*!

CFSC has been a respected philanthropic force since its founding in 1979. By providing a highly personalized link between donor's dreams and the community's needs, CFSC has helped ensure that people of vision and means have a trusted partner in their commitment to having an enduring impact on the community and causes they treasure.

CFSC expects its team to embody a set of seven core values:

- Compassion
- Empowerment
- Innovation
- Integrity
- Quality
- Stewardship
- Inclusiveness

Sarasota County is an exceptionally generous community. In just one day in 2016, donors to CFSC's 24-hour online Giving Challenge donated over \$13.1 million. The 2018 Giving Challenge raised \$11.7 million for more than 630 local nonprofits. The 2020 Giving Challenge is expected to be extraordinary as well. Since 2012, the Giving Challenge has raised a combined \$40 million for local nonprofits. The Giving Challenge is but one example of how CFSC welcomes all community philanthropists.

A dedicated advocate of excellence in philanthropy, CFSC is accredited by the Community Foundations National Standards Board, a supporting organization of the Council on Foundations. Perhaps more important locally, the Foundation is widely regarded as a

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collaborative partner by hundreds of nonprofits serving the people of Sarasota County. Complete information on the Community Foundation of Sarasota County can be found here: www.cfsarasota.org

All interested candidates should complete an application through the Community Foundation's recruitment website and include a current resume and cover letter.

Please apply online at www.CFSarasota.org.

For additional information or questions, please contact:

Amy Helms
Manager, Human Resources and Office
Community Foundation of Sarasota County