

Be The One



The Community Foundation of Sarasota County seeks a dynamic:

Philanthropic Advisor

The Philanthropic Advisor is responsible for developing and furthering relationships with existing donors, prospective donors, financial advisors, and the community at large to generate donors opening charitable giving funds at the Community Foundation of Sarasota County. The primary focus is the necessary relationship building and solicitation needed to reach the organization's goals and assist donors in achieving their charitable goals.

The successful candidate will be a high-energy professional with a proven ability to build long term, trusting relationships between an organization and their stakeholders. The successful candidate must have extensive experience using problem-solving and analytical skills to be able to successfully assist donors with creating their philanthropic plan to achieve the highest desired results. The ability to work seamlessly in a cohesive team environment as well as strong written and communication skills are also required for this position.

The Philanthropic Advisor is a full-time position offering excellent employer paid benefits to include health, dental, vision, short/long term disability and life insurance. The benefits package also includes 401K with matching and bonus opportunity and more!

Essential Functions:

1. Identifies, cultivates, solicits, and stewards a portfolio of prospects, current donors, and professional advisors to develop their relationship with the CFSC and 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 CFSC, 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. Cultivate and grow relationships with community organizations and other institutions and associations to position the Foundation as the premier community-based center for philanthropy.

Expected Outputs:

1. Maintain portfolio management responsibilities for donor advised and other funds as assigned to assist donors in the furthering of their charitable goals, generating additional contributions to funds and referrals to other prospective donors.
2. Utilizes the FIMS database to track and record relationships, builds donor profiles, and/or research donor interests and giving patterns.



3. Create presentations in collaboration with colleagues for opportunities to present to prospective donors, professional advisors and community groups in collaboration with other colleagues.
4. Participate in cross-departmental work teams including, but not limited to: Marketing/Communications, Community Impact, Knowledge & Equity and Finance.
5. Attain goals and objectives that align with those of the Philanthropic Department.

Position Qualifications:

1. Bachelor's degree required. A combination of related experience and education may substitute for degree.
2. Minimum of 5 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 required.
3. Demonstrated customer relationship management experience. Comfortable working with assigned relationships in telephone and face-to-face consultations, as well as public speaking.
4. Highly developed relationship-building and listening skills (i.e., ability to easily connect and form long-term relationships).
5. Effective and persuasive verbal and written communication style. Ability to develop and maintain positive interpersonal relationships,
6. 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 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 (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. Accordingly, CFSC purposefully champions the community goals of its donors, committed at every turn to helping individual community investors achieve the maximum impact for the philanthropic dollars they entrust to the Foundation.

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. In an unparalleled 2020, the Giving Challenge raised \$19.1 million from 59,000 donors to strengthen 686 local nonprofit organizations. The Giving Challenge is but one example of how CFSC welcomes all community philanthropists and believes that everyone can be a philanthropist, not just those with means.

Be The One



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 collaborative partner by hundreds of nonprofits serving the people of Sarasota County.

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

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

All interested candidates should apply online at www.CFSarasota.org.

For additional information or questions, please contact:

Lisa Carter
Director, Organizational Capacity
Community Foundation of Sarasota County