

**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 will be relationship building and the appropriate level of solicitation necessary to reach the organization's goals of opening new funds and maintaining high donor satisfaction for existing donors.

The successful candidate will be a high-energy professional with a proven ability to build long term, trusting relationships between an organization and their patrons. The successful candidate must also have extensive experience using problem-solving and analytical skills to be able to successfully guide donors by listening to their hopes, dreams and ambitions. The ability to work seamlessly with our cohesive team as well as strong written and communication skills are required for this position.

The Philanthropic Advisor is a full-time position offering excellent benefits including employer paid health, dental, vision, short/long term disability and life insurance for employees. In addition to a generous Paid Time Off policy and paid holidays, the Community Foundation of Sarasota County also offers a 401K with a generous matching opportunity, bonus opportunities and more!

**Essential Functions:**

1. Responsible for donor acquisition and fund development by promoting Community Foundation of Sarasota County services to prospective donors, current donors, and professional advisors to increase giving to current funds, and to develop new funds.
2. Serves as the primary relationship manager for a portfolio of donors, prospects, and professional advisors to ensure satisfaction with the Community Foundation of Sarasota County.
3. Develops and maintains relationships with wealth advisors, estate planning attorneys, and CPAs serving high net worth clientele to provide charitable giving support and facilitate referrals to the Community Foundation.
4. Maintains a working knowledge of issues and initiatives in the area and familiarity with local nonprofit networks.
5. Works collaboratively with other Community Foundation team members to provide optimal donor support.

**Expected Results:**

1. Annually, generate a minimum of 25 new donors opening funds, with an average per donor opening gift amount of \$5,000.
2. Manage a portfolio of 200+ donors and fund contacts to encourage, inform, and support their charitable giving.



3. Develop relationships with Professional Advisors to include estate planning attorneys, wealth managers, and CPAs to serve as a source of referrals.

**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, marketing, wealth management 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 troubleshooting 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 (CFSC) has been named one of the *Best Places to Work in Sarasota-Manatee* for both 2018 and 2019!

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. 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 and believes that everyone can be a philanthropist, not just those with means.

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.

Be The One



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

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

Complete information on the Community Foundation of Sarasota County can be found online at [www.cfsarasota.org](http://www.cfsarasota.org)

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

**Please apply online at [www.CFSarasota.org](http://www.CFSarasota.org).**

For additional information or questions, please contact:

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Manager, Human Resources and Office  
Community Foundation of Sarasota County