

Charitable Giving Advisor

PURPOSE OF POSITION

The Charitable Giving Advisor plays a vital role in the achievement of the Community Foundation's overall charitable giving goals. This position also works with charitable partners, such as corporations, professional advisors, nonprofit organizations and individual donors. Key strategies of the position include: working with donors to establish charitable giving funds, including donor pipeline development and management; providing strategic giving services and offering tax-wise charitable giving strategies; complex gift acceptance and stewarding relationships through year-round engagement with assigned fund holders.

CORE COMPETENCIES

Accountability/Dependability | Relationship Building | Training/Presenting Information | Results Focus & Initiative | Discernment

DUTIES AND RESPONSIBILITIES

- Develops and implements strategies to achieve assigned Charitable Giving goals.
- Facilitates establishment of new charitable giving funds and onboarding process.
- Manages donor relationships with assigned charitable giving fund holders to maximize the donor experience with the Community Foundation.
- Represents the Community Foundation at agency, business or committee meetings related to endowments and investment of funds administered by the Community Foundation.
- Facilitates complex gift transactions in collaboration with the Chief Charitable Giving Officer.
- Maintains a process for tracking prospects and donor engagement activities through Community Foundation's internal database system.
- Conducts strategic giving meetings with individuals, families and businesses to maintain relationships and facilitate giving.
- Ensures that the Community Foundation meets the highest standards of prompt response and accurate information to assist donors and advisors.
- Represents the Community Foundation at community events and professional associations.
- Conducts a minimum of four charitable giving meetings per week.

QUALIFICATIONS

A self-starter who enjoys cultivating new relationships; ability to gain the confidence and respect of donors and professional advisors; mature judgment; high integrity; approachable and comfortable initiating conversations with donors; ability to understand complex issues; creative problem solver; critical thinker; strong written communication skills and the ability to work one-on-one with donors or make a formal presentations to large groups; the ability to listen and find connections between donor needs/interests and giving strategies; broad community and nonprofit knowledge; experience working with volunteer committees, boards and donors; well-organized; resourceful; motivated; ability to multi-task; excellent interpersonal and customer service skills; strong computer skills; willingness to seek ongoing training and/or professional certificate(s) to maintain and improve current skills and knowledge.

Education and Experience

A Bachelor's degree and a minimum of five years of experience in development, donor cultivation, gift planning, financial services or closely related professional experience preferred. Chartered Advisor of Philanthropy (CAP®) certification strongly preferred. Knowledge of planned giving and major gift solicitation in addition to the ability to facilitate complex gift transactions is preferred. Proven ability to interact comfortably with a broad spectrum of donors, community leaders, professional advisors, nonprofit representatives and community volunteers is required. Strong knowledge of the full range of deferred giving vehicles and the tax laws related to charitable giving and experience in developing and implementing successful planned and major gift programs preferred. Demonstrated ability to raise substantial funds from individuals, businesses and other potential contributors is highly desired. Must be able to manage multiple projects and tasks simultaneously and work both independently and in a team environment.

Language Ability

Excellent writing, proofreading and critical thinking skills. Must have excellent interpersonal and communication skills. Ability to effectively present information to customers, clients, and other employees of the organization. Excellent telephone and customer service skills.

Cognitive Demands

Proven ability to manage multiple projects and tasks simultaneously, set priorities, handles numerous responsibilities, and work both independently and in a team environment. Adaptable attitude, attention to detail, organized self-starter, and creative. Able to interface well with a variety of people. Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is frequently required to use hand to finger, handle or feel. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision.

APPLICATION PROCESS

Interested applicants should submit their resume, cover letter and salary requirements [via this electronic form](#). We encourage anyone considering the position to apply. The Community Foundation is committed to pay equity and provides a comprehensive compensation package which includes annual salary and benefits benchmarking. Salary range will be shared with candidates prior to the interview process, or [upon inquiry](#). Initial applications will be accepted until the appropriate candidate is identified.