



# Job Description

<b>Position Title</b>	Philanthropic Advisor	
<b>Department</b>	Foundation	<b>Reports To</b> – Vice President of Community Foundation
<b>FLSA Status – Exempt</b>	<b>Classification – Full Time</b>	<b>UWW Code -</b>

## Announcement

The Community Foundation of Volusia-Flagler Counties, a division of the United Way of Volusia-Flagler Counties seeks an ambitious, inquisitive and solution-minded individual to serve as a Philanthropic Advisor. The ideal candidate will have:

*Required:*

- 3-5 years of professional experience
- Ability to connect with high-net worth clients through active listening
- Capacity to provide solutions tailored to clients’ needs and goals
- Pipeline building experience including identifying leads, developing strategies for introductions, creating and executing professional presentations, and the ability to close
- Polished, professional presentation skills
- Competency to learn and effectively utilize various technology systems

*Preferred:*

- Professional designation (CAP, CFP, CFRE, etc.)
- Charitable planning experience
- High dollar sales or fundraising experience

## Compensation & Benefits

- Salary Range - \$50,000 – 65,000, plus incentive
- 80% employer paid health insurance
- 2% company retirement contribution plus 5% match
- 3 weeks paid vacation in first year
- Hybrid work schedule
- Family and medical leave of up to 8 weeks fully paid
- Employer-sponsored trainings and certifications

## Core Responsibilities

### Effective Fundraising

- Listens to the needs, interests, and passions of the donor with an eye towards connecting them with community work.
- Prioritize and support the philanthropic goals of donors by developing individualized plans for success.
- Engage in development process of research, identification and prioritization of appropriate new donor opportunities and coordinate an introduction to the Foundation.
- Facilitate execution of fund agreements.
- Drive revenue through special events such as the Celebration of Philanthropy, Financial Symposium, donor engagement events, and others.

### **Strategic Relationship Management**

- Practices strong written and oral communication skills.
- Understands the relationship between the United Way and the Community Foundation and actively utilizes all available resources to respond to donor goals.
- Cultivate relationships with existing and prospective donors to further the goals of the Foundation.
- Builds organizational capacity through volunteer collaboration and to develop high-impact, meaningful volunteer opportunities that increase revenue, impact, outcomes, and influence.
- Cultivate and manage relationships with professional advisors to increase awareness of the Foundation and promote charitable giving in financial and estate planning.
- Serve as a spokesperson for the integrity, role and value of the Foundation.
- Foster public awareness and understanding of the Foundation and its work through presentations to professional advisors, prospective donors, community organizations and other interested groups.

### **Entrepreneurial and Innovative**

- Considers new opportunities to achieve goals and drives improvement in process.
- Stays current in the technical aspects of charitable giving including tax law, technology, etc.
- Recognizes the power of effective stewardship (thanking donors, informing them about the impact of their gift, keeping them apprised of progress on the community work it is intended to address and deepening the relationship) and develops and implements plans to steward donors of all giving levels.

### **Business Development and Sales**

- Oversee the management of the day-to-day needs of fundholders, leveraging the expertise of colleagues as needed.
- Develop presentations and proposals, donor relationship review reports and well-written correspondence with donors.
- Demonstrate ability to achieve a strong proficiency in development and financial software (ex. IWave, Crescendo, FIMS, Microsoft products).
- Ability to close a sale and support donor interests.

## **Qualifications**

Bachelor's degree from an accredited institution OR 3-5 years of experience in sales, nonprofit management, development, or other field.

Experience in fund-raising, gift-planning, and/or sales activity in a non-profit or for-profit setting.

Professional designation in fundraising preferred.

Strong interpersonal relationship skills.

Professional and polished presentation skills.

Written and oral communication proficiency.

Driver's license.

## **Working Conditions & Physical Requirements**

Work is carried out in a controlled, agreeable environment as generally represented by normal office conditions. Employees may be required to assist with or attend various offsite events related to programs or fund raising that are scheduled evenings and/or weekends. These events may require several hours on your feet and assisting with heavy lifting and carrying.

## **Direct Reports –**

N/A

**Date last reviewed/revised: 8/11/2022**