



PHILANTHROPIC SERVICES ASSOCIATE - JOB DESCRIPTION

Job Purpose: The Philanthropic Services Associate reports to the Senior Philanthropic Services Officer and primarily provides administrative support to the Foundation's philanthropic services to individual fund-holders, corporate advised funds and private foundation services. The Community Foundation has nearly 500 funds, including donor advised, scholarships, agency and designated funds. The Philanthropic Services Associate will serve as the primary contact for a portfolio of fund holders and provide individualized assistance to fund holders and other partners. The Philanthropic Services Associate assists with gift acknowledgment letters, prospect research, special events and sponsorships. Based on the duties described below, this is a non-exempt position, with occasional flexible schedule required.

Primary Duties and Responsibilities:

- Provides administrative support for the Foundation's philanthropic activities and supports the needs of the Philanthropic Services Department
- Enters and maintains profile, grant, data, invitation lists and reporting
- Performs due diligence, inputs and processes grants
- Provides technical assistance for online data systems to nonprofits and donors
- Monitors reporting requirements and payments for donor advised grants
- Performs research to assist Vice President for Philanthropic Services to identify prospects
- Updates and maintains donor database records, prospect management and gift acknowledgment letters as needed.
- Assists with special events and securing sponsorships
- Works with a portfolio of existing donors to provide ongoing philanthropic services and increase level of donor engagement
- Provides individualized philanthropic services as requested by fund holders
- Participates in orientation meetings with new donor advisors to understand their interests and intentions
- Develops and maintains comprehensive and accurate information regarding donor advisor interests and preferences
- Meets with donor advisors as needed
- Serve as a contact for fund holders, able to answer questions about their funds and the Foundation's work in general
- Receive and track grant requests from donor advised funds

- Encourage co-investment by donor advisors
- Produce reports as requested for internal and external audiences
- Maintain cross-functional working relationships with other departments needed for timely and full-service philanthropic support to fund holders
- Serve as liaison with program staff to recommend grant and co-investment opportunities that support fund holders' philanthropic interests
- Supervise and monitor work of philanthropic services interns, volunteers and independent contractors, as needed
- Manage and facilitate special projects, as assigned
- Participate in ongoing training and professional development, including staying abreast of industry trends and their appropriateness for the Foundation's philanthropic services practice
- Assists the President & CEO, Senior Philanthropic Services Officer and Vice President of Philanthropic Services on other assignments as requested

SKILLS/EXPERIENCE:

- Proven analytical, database, and reporting skills
- Relational database/donor management software experience
- Advanced computer and office administration skills
- Computer and office skills: MS Word, Excel, Outlook, and relational database experience
- Excellent attention to details and follow-through including proofreading and editing
- Strong communicator
- Strong organizational skills and ability to manage multiple projects
- Objective and critical thinker
- Strong problem solving skills
- Ability to work with or without supervision
- High level of customer service
- Inquisitive and proactive nature
- Ability to maintain the confidentiality of our donors

To Apply:

Please send a cover letter and resume to HR@cfmco.org, with Philanthropic Services Associate in the Subject line.