

Lynx Employer Resources is proud to support **Community Foundation Sonoma County** in their search for a **Senior Philanthropic Advisor!**

If you're someone who:

- Is a **mission-driven** philanthropic professional who embraces **collaboration**, open communication, and constructive team partnerships
- Has been told on more than one occasion that you are an excellent **active and empathetic listener**
- Shows up with a **sense of purpose, heart, and authenticity**
- Embraces an **analytical** work strategy, coupled with **compassion** for the challenges inherent in the human experience
- Is compelled by your innate **curiosity and love for learning** to dig deep, research and explore new perspectives and ideas

...then we have a great opportunity for you!

ABOUT Community Foundation Sonoma County:

Community Foundation Sonoma County (CFSC) is the hub of philanthropy -- we connect people, ideas, and resources to benefit all who live and work here. We invest in the promise of Sonoma County by facilitating:

- **Connections:** We partner with donors and professional advisors to build resources that create long-term philanthropic solutions.
- **Stewardship:** We fulfill the charitable legacies of our donors by supporting a diverse cross-section of effective nonprofits.
- **Solutions:** We convene individual leaders and support dynamic organizations to stimulate innovative ideas, foster collaborations, and strengthen community resilience.

Established in 1983 by a group of local community leaders, CFSC promotes philanthropic growth and supports the long-term sustainability of our nonprofit partners. As a public 501c3 nonprofit, we strengthen Sonoma County through our local knowledge, leveraged philanthropic resources, and inspiration for legacy and estate planning.

Our work is guided by our values statement:

- We know that to create a fair and just community, some may need more to achieve the same.
- We embrace our differences and our common bond.
- We cultivate leaders, supporting them to advocate for their communities and empowering them to create change.
- We promise to tackle tough issues with compassion and courage, choosing humbly to take a step forward instead of resting in the comfort of where we are.

ABOUT the Senior Philanthropic Advisor Position:

The Senior Philanthropic Advisor is responsible for providing exceptional philanthropic guidance to *Elevate* fund holders (high-net worth individuals) to inspire increased philanthropic giving, maximize their philanthropic objectives, deliver impactful client services, and contribute to the growth of

philanthropic funds at CFSC. In addition, the Senior Philanthropic Advisor implements strategies to expand relationships with professional financial advisors and creates opportunities to accomplish the Foundation's long-term growth strategies.

Essential Duties and Responsibilities

Philanthropic Advising (60%)

- Manages a portfolio of high net worth fund holders and serves as a Philanthropic Advisor to *Elevate* donors and *Elevate* agency fund holders by providing attentive, proactive, customized advising services to all donors or agencies in their portfolio.
- Oversees portfolio of donors' grantmaking, legacy giving, and other critical relationships within the Foundation.
- Creates donor engagement and stewardship plans and supports donors when accomplishing their short-term objectives and long-term goals.
- Plans, implements, and refines donor meetings while guiding them to determine what is to be accomplished through their charitable experiences with the Foundation.
- Gathers information about community needs as requested and invites donors to participate in events or other opportunities which may be relevant to their charitable preferences.
- Conducts site visits, organization analysis, and research projects and shares community needs and information with donors.
- Builds relationships with nonprofit leaders, community stakeholders and donor's advisors.

Advancement (40%)

- Collaborates closely with VP for Philanthropy and VP for Community Impact to develop and implement creative opportunities and materials, including case statements, to inspire donors to increase unrestricted and Field Of Interest gifts.
- Creates opportunities to engage and steward relationships with professional financial advisors across the region.
- Proactively build relationships with new, existing, and past donors; seek new funding by cultivating, stewarding and soliciting.

Supervisory Responsibilities

- None.

Competencies and Qualifications

A successful candidate has 5-7 years progressively responsible experience working in philanthropic organizations, a familiarity with non-profit policies and procedures, and client related services, knowledge of the use of alternative charitable gift-giving methods, communications and/or donor relations. The Senior Philanthropic Advisor must possess a range of creative fundraising and client engagement skills including the ability to motivate and engage community leaders, donors and prospective donors, board members, and professional financial advisors to invest with CFSC. They have proven success in acquiring substantial charitable contributions and gifts of increased amounts over time.

- Experience working with major donors and family systems around issues related to wealth and giving including soliciting major gifts.
- Self-starter who can work effectively both independently and with colleagues as contributing member of the team.

- Diplomatically offer insight, advice, and recommendations to donors so they can best support the organizations in our community and beyond who are closest to the issues and the solutions.
- Possess strong internal and external customer service skills
- Enables and inspires trust with people by listening, asking questions, being responsive to feedback, and building authentic relationships around the issues they care about.
- Ability to analyze changing community conditions and develop creative solutions in a fast-paced environment
- Strong organizational skills and attention to detail
- Ability to multi-task and meet deadlines. Results-oriented.
- Ability to work with sensitive information and maintain complete confidentiality.
- High level of personal and professional integrity and ethics.
- Computer proficiency
- English proficiency required, second language, especially in Spanish, would be beneficial.
- Knowledge of the local Sonoma County community is preferred.

Physical Requirements

- Ability to sit, stand, stoop, reach, lift (up to 10 pounds), bend, etc.
- Hand and wrist dexterity needed to work on a computer
- Visual acuity
- Ability to travel locally

Benefits:

- Medical, Dental and Vision insurance – 100% covered for employee and 60% for dependents
- Life Insurance
- Employer annual contribution to 403b Retirement Plan after one year of service
- Employee Assistance Program (EAP)
- Professional development
- Sick and vacation pay
- Bereavement pay
- 11 Paid Holidays
- Health and wellness time
- Flexible Summer Fridays
- Current Hybrid work model (2 days on-site office/ 3 days remote) – subject to change

Compensation:

- Salary range starts at \$75,000, commensurate with experience

If you're excited by this opportunity:

Interested candidates should email their resume and cover letter to recruit@lynx-er.com (early submission is encouraged). THANK YOU!