



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

At CFSC our team is made up of people with different strengths, experiences and backgrounds, who share a passion for investing in the promise of Sonoma County. We are deliberate, intentional and purposeful about the kind of culturally diverse team we are building.

If this position resonates with you, we encourage you to apply!

All qualified applicants will receive consideration without discrimination on the basis of race, color, religion, gender, national origin, ancestry, age, marital status, pregnancy, medical condition, disability, or sexual orientation.

If you're someone who:

- Is **mission-driven** and 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**
- Is adept at **project management** and **detail** work, while genuinely thrives on providing the best **client support** possible
- Is compelled by your innate **curiosity and love for learning** to dig deep, research and explore new perspectives and ideas
- Is looking for a role where you can build upon your **fund development** experience and/or interest in **wealth management**

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

ABOUT Community Foundation Sonoma County:

Community Foundation Sonoma County 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 Philanthropic Advisor Position:

The Philanthropic Advisor advances the mission of Community Foundation Sonoma County through developing close, trusting, long-term relationships with existing and new Community Foundation fundholders. This key member of the Philanthropic Services team is a professional in the Development/Advancement or client relations field who has the experience, knowledge, and skills to focus on stewarding long term relationships with current donors and identifying the potential of new donors to establish estate gifts at the Community Foundation. The Philanthropic Advisor will work to enhance donor engagement experiences through the Foundation which results in longer term financial investments through the Community Foundation.

Essential Duties and Responsibilities:

Philanthropic Advising

- Manages a portfolio of fund holders and serves as a Philanthropic Advisor to *Essential* donors and *Essential* agency fund holders.
- Supports fund holders’ philanthropic goals by providing excellent, high-touch customer service, transactional grantmaking assistance, fund management, and philanthropic planning.
- In collaboration with other key team members, creates and implements short and long-term donor engagement goals and activities that align with Community Foundation’s growth and impact goals, to ensure donors meaningful engagement and retention.
- Plans, implements, and refines donor meetings and communication 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 invite donors to include information in collective philanthropic response through grantmaking.
- Participate in events or other nonprofit learning opportunities.
- Builds relationships with nonprofit leaders, community stakeholders and donor’s advisors.

Development

- In partnership with Interim Vice President for Philanthropic Planning, cultivate and grow relationships with professional advisors, community organization and other institutions and associations to position the Community Foundation as a premier community-based center for philanthropy.
- Achieve performance metrics for gifts to existing funds through cultivation of existing foundation relationships and cultivation of prospective donors.

Supervisory Responsibilities:

- None.

Competencies and Qualifications:

The Philanthropic Advisor must possess a range of skills including the vision and presence to engage community leaders, donors, board members, prospects, and professional financial advisors. A successful candidate has 3-5 years progressively responsible experience while working in the field of philanthropy, nonprofit management, client services, use of alternative charitable gift-giving methods,

communications and/or donor relations or comparable experience. Knowledge of the local community is preferred.

- Self-starter who can work effectively independently and with colleagues as member of a team.
- Possess strong customer or client service track record.
- Excellent communication skills and ability to provide feedback, offer suggestions, insight, advice and recommendations to a variety of internal and external audiences. Diplomatically offer insight, advice, and recommendations around how donors can best support the organizations and leaders in our community and beyond who are closest to the issues and the solutions.
- Skilled and excited to build trust with people, listen, ask questions, responsive to feedback, and build authentic relationships around the issues they care about, and activating those interests towards social justice and community partners and leaders.
- Strong internal and external customer service ethic, personal warmth, and sincerity.
- Ability to work in a fast-paced environment and flexibly and creatively analyze changing community conditions and create or implement responses to various situations.
- 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.
- Familiarity with philanthropy and nonprofits.
- Computer proficiency
- Proficient in English language required and bi-lingual proficiency in Spanish would/could be helpful, but not required.

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: \$75,000 - \$90,000

If you're excited by this opportunity:

Interested candidates should email their resume and cover letter (with “CFSC – PA” in the subject line) to recruit@lynx-er.com . THANK YOU!