

Philanthropic Advisor

POSITION DESCRIPTION

The philanthropic advisor participates as part of the Advancement and Philanthropic Services department, which cultivates and maintains relationships with the Foundation's donors. The philanthropic advisor is responsible for new fund development, promotion of the Foundation's philanthropic services, and engagement with targeted networks, with the goal of building diverse relationships that will fund the organization's work. This position works under the direct leadership of the vice president, advancement and collaboratively with the Foundation staff, leadership, and volunteers. The philanthropic advisor is an exempt position.

ABOUT THE WINSTON-SALEM FOUNDATION

We are a nonprofit community foundation, comprised of over 1,500 funds, that assists people and organizations with their charitable giving, provides financial aid to college students, and offers a variety of grants programs and a mission-aligned investment program to support nonprofit organizations in Forsyth County. We are the oldest foundation in North Carolina, and we are one of the oldest community foundations in the country. Since 2018, the Foundation has been on a journey to deepen its understanding of and commitment to racial equity as both a priority in our work in the community and as a hallmark of our organizational culture.

Our vision:

A generous and trusting community where everyone is thriving.

Our mission:

We inspire giving and link resources to action, strengthening Forsyth County—now and forever.

Our values:

- **Inclusion** – we practice and champion inclusion, honoring the strengths and experiences of all in our community.
- **Accountability** – we honor the intentions of our donors and partners and hold ourselves to the highest standards of ethics, service and stewardship.
- **Continuous Learning** – we are committed to learning and evolving with our community and our partners.

DESCRIPTION OF RESPONSIBILITIES

All staff work together to live out the Foundation's mission, values, and equity commitment. Each person actively participates in education sessions, work groups, and other formal and informal opportunities to learn about and operationalize our shared commitment to equity. The philanthropic advisor will have the following specific duties to assist the Foundation in fulfilling its mission and vision:

Asset Development

- Create, implement, and evaluate new business and growth strategies.
- Lead strategy, research and cultivation efforts to engage people of color in the charitable work of the Foundation. Partner with the Black Philanthropy Initiative, Women's Fund, professional advisors, and Foundation volunteers in developing these relationships.
- Direct the personal identification, contact, and cultivation of relationships to grow the number of fundholders through regular engagement with diverse networks of individuals, professional advisors, nonprofits, and community leaders.
- Develop relationships and new programs that support the long-term future of the Foundation by securing new charitable funds of all types.
- Respond to inquiries and follow up on requests from prospective donors and professional advisors.
- Assist in the administrative process of establishing new funds of all types, including endowed and donor-advised funds, by drafting fund agreements, correspondence, and other necessary follow up.
- Demonstrate the Foundation's commitment to accountability by honoring donor intent, furthering donors' charitable goals, and seeking to engage charitable partners to address the most pressing needs of the community.
- Maintain accurate records for all contacts with donors, prospective donors, and professional advisors.

Promotion of Philanthropy

- Develop strong relationships with community leaders, businesses and professional advisors and educate professional advisors about the comparative benefits of the Foundation.
- Contribute to the overall strategic philanthropy of the team by collaborating on and sharing information in the development of collateral materials that highlight the Foundation's products, services and comparative benefits as a charitable partner and knowledgeable community leader.
- Coordinate education/cultivation events such as seminars or lunch and learn events for advisors, appreciation events for advisors and/or donors, and gatherings for prospective donors.
- Maintain current knowledge of philanthropic trends and legislation that impacts the field of philanthropy in general and charitable funds in particular.
- Actively solicit opportunities to speak to varied and diverse groups and organizations to promote philanthropy and the Foundation's work.
- Participate in local, regional, and statewide groups to promote working with community foundations.

Other Related Activities

- Other assignments and special projects as assigned by the vice president, advancement.

QUALIFICATIONS

- Commitment to the Foundation's values: Inclusion, Accountability and Continuous Learning.
- Commitment to and understanding of racial equity.
- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures.
- A minimum of five years' experience in development, major gifts, donor relations, or financial services with a preference for candidates with experience in or a working knowledge of endowments and planned giving.
- Strong customer service ethic.
- Excellent interpersonal and written communication skills with strong public speaking skills and experience.
- Commitment to maintaining confidentiality.
- Personal enthusiasm for and commitment to philanthropy.
- Strong organizational skills, especially planning, coordination, and follow-up.
- Demonstrated ability to form genuine, professional relationships and creatively approach new constituencies representing the diversity of our community.
- Ability to work collaboratively within a team and willingness to support interrelated roles of other staff.
- Flexibility to adjust activities and assume new responsibilities.
- Residency in Forsyth County is a must; knowledge of and engagement in Forsyth County and surrounding communities is a plus.
- Computer proficiency: Microsoft Office Suite.
- Experience with a constituent management database is an advantage.
- Ability to work outside traditional business hours, travel locally, and represent the Foundation at community events.

Salary range is \$82,000 - \$87,000, commensurate with experience. Benefits include generous paid time off (PTO) and holidays. Health insurance, life insurance, dental insurance, short-term and long-term disability insurance, and parental leave begin the first of the month following 30 days of employment. Eligibility for the defined benefit retirement plan begins after one year of service. Other optional benefits include a flexible benefit plan, supplemental insurance with AFLAC, employee supplemental retirement plan, charitable match program, and tuition and fee reimbursement.

The Winston-Salem Foundation is committed to building a staff that reflects the community served by the Foundation's mission and strategic priorities. We invite applications from diverse candidates and will not discriminate on the basis of race, color, religion, sex, national origin, ancestry, disability, age, or marital status.

To apply, please visit wsfoundation.org/careers. The application deadline is 5:00pm on February 5, 2021.