

Philanthropic Advisor

Development and Donor Engagement Team

POSITION DESCRIPTION

The Philanthropic Advisor is a member of the Development and Donor Engagement department, which cultivates and maintains relationships with the Foundation's donors. The Philanthropic Advisor develops, facilitates, and markets lifetime gifts from existing and prospective donors. They provide counsel and advice to staff, donors, and allied professionals regarding various philanthropic tools, approaches, techniques, and trends. This role serves as a secondary liaison with attorneys, accountants, financial advisors, and other intermediaries and agents of wealth. The Philanthropic Advisor works with existing and new donors and intermediaries to secure new funds and gifts to the Foundation. This position helps to generate ideas and explore opportunities to achieve the strategic goals of the Foundation. The Philanthropic Advisor works under the direct leadership of the Senior Philanthropic Advisor and works collaboratively with the Foundation's staff, leadership, and volunteers. The Philanthropic Advisor is an exempt position.

ABOUT THE WINSTON-SALEM FOUNDATION

The Winston-Salem Foundation's charitable history and local knowledge run deep. Since our founding in 1919, we've partnered with generous community members to build a better future for residents of Forsyth County and beyond. We are a nonprofit community foundation, the oldest foundation in North Carolina, and we consistently rank among the largest community foundations in the United States. We are comprised of hundreds of charitable funds created by individuals, families, and organizations who want to improve the quality of life for those around them. In partnership, we create meaningful impact by investing in community priorities, providing scholarships and charitable grants, and raising awareness of community issues. Since 2018, the Foundation has committed to advancing racial equity across all our work, ensuring that Winston-Salem becomes a place where everyone thrives.

MISSION:

We foster meaningful connections and link resources to purposeful action, creating a brighter future for all who call Forsyth County home.

VISION:

A vibrant, sustainable community where everyone thrives.

BELIEFS:

Our core beliefs influence everything we do and guide us as we work toward our vision.

- **Relationships are our most valuable resource.** We strive to build meaningful relationships and partnerships by listening to understand and seeking diverse perspectives to ensure that our work is informed by and in collaboration with the community.
- **Equity makes our vision possible.** We seek justice in all our actions, ensuring everyone in our community can access the resources and opportunities needed to thrive.

- **Learning is an ongoing journey.** We commit to continuously seeking and sharing knowledge with community partners and donors, embracing change, and striving for improvement to ensure our efforts lead to meaningful and sustainable progress.
- **Philanthropy is a powerful tool for change.** By inspiring and facilitating generosity, we engage with members of our community to contribute in ways that are meaningful to them, driving purposeful and lasting change together.

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. This role supports the Development and Donor Engagement Team as an active and positive member of the WSF workforce.

Asset Development

- Utilize research and donor profile analysis to identify prospects for new funds and/or increased engagement with the Foundation
- Participate in the cultivation of new and existing relationships to achieve the Foundation's resource development goals according to the Foundation's strategic plan.
- Utilize interpersonal savvy and confidence to network, motivate, and skillfully craft giving strategies to benefit donors, advisors, nonprofit beneficiaries, and the Foundation.
- Participate in the Foundation's development and cultivation of professional advisor relationships.
- Support the Foundation's planned giving program by drafting and reviewing revocable trust agreements with donors and professional advisors.
- Provide team support and stewardship for various constituent groups with an emphasis on existing donors, new donors, and professional advisors.
- Respond to inquiries and follow up on requests from existing donors, prospective donors, and professional advisors.
- Assist in the administrative process of establishing gift plans and new funds of all types by drafting fund agreements, revocable trust agreements, correspondence, and other necessary follow up.
- In partnership with the Black Philanthropy Initiative and the Women's Fund, strategize ways to engage people of color and women in the charitable work of the Foundation.
- 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 throughout the community with existing donors, prospective donors, and professional advisors to share knowledge of charitable giving strategies and promote the comparative benefits of charitable partnerships with the Foundation.

- Represent and position the Foundation as an effective and impactful charitable partner through community presentations and engagement.
- Assist in planning and executing appropriate cultivation/education events and gatherings for donors, prospective donors, and professional advisors, including the annual Professional Advisor's Breakfast
- Collaborate with the VP of Development and Donor Engagement, the Senior Philanthropic Advisor, and the Marketing and Communications team to develop collateral materials that highlight the Foundation's products and services as a charitable partner and knowledgeable community leader.
- Maintain current knowledge of philanthropic trends, legislation, and planned giving techniques that impact the field of philanthropy in general and charitable funds in particular.
- Participate in local, regional, and statewide groups to promote working with community foundations.

Fund Administration

- Collaborate across teams to clarify and document gift plans.
- Assist with fund questions, document changes, and future plans.
- Oversee the documentation and execution of charitable plans and matured gifts to follow through on donor intent.

Other Related Activities

- Manages a portfolio of donors
- Participate in the Foundation's regular staff and internal meetings and collaborate with internal departments, as needed.
- Perform other duties as assigned

QUALIFICATIONS

- Experience in philanthropy and/or financial planning, planned giving, or trust and estate planning is preferred
- Strong commitment to the Foundation's values
- Demonstrated experience working collaboratively
- Commitment to and understanding of racial equity
- Chartered Advisor in Philanthropy® (CAP®) or Impact Philanthropy Advisor (IPA) designation or willingness to obtain
- Strong interpersonal skills, organizational skills, and demonstrated ability to manage and execute multiple projects and priorities
- Strong communication skills and attention to detail
- Understanding of a constituent management system and its importance in development work

Additional Qualifications

- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures.
- Commitment to and understanding of the Foundation's mission, vision, and beliefs.

- Ability to embody and grow in the Foundation's beliefs, demonstrated through:
 - Fostering meaningful relationships and partnerships with a flexible, team-oriented approach that inspires trust.
 - Continuously seeking and sharing knowledge, embracing change, and striving for ongoing improvement.
 - Upholding a personal commitment to justice and racial equity in actions and decision-making.

HYBRID WORK SCHEDULE

The Foundation offers a hybrid work schedule where staff work in person for part of the week and have the option to work remotely on other days. The Philanthropic Advisor will be expected to be in-person a minimum of three to four days per week. Our office is downtown Winston-Salem.

SALARY AND BENEFITS

The salary for this position is \$83,586. In alignment with our Compensation Philosophy and Process, we set starting salaries with great care and consistency—looking both at the role itself and how it fits within the organization as a whole. Because of this intentional approach, we do not engage in salary negotiations. While annual increases are dependent on available resources, we plan for them each year as part of our budgeting process and see them as an important part of supporting staff growth and long-term retention.

Benefits include generous paid time off (PTO) and holidays, along with a 10% salary contribution by the Foundation to your retirement plan after one year of service. Health, dental, and life insurance, as well as short-term and long-term disability coverage and parental leave, begin on the first of the month following 30 days of employment. Additional optional benefits include a flexible benefits plan, various supplemental insurance options, an employee supplemental retirement plan, a 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, sex, religion, national origin, sexual orientation, gender identity, age, genetic information and veteran or disability status.

To apply, visit wsfoundation.org/careers.