



Philanthropic Advisor

Position: Regular, Fulltime, Exempt

Department: Advancement

Reports to: Director, Philanthropic Services

Supervises: Philanthropic Coordinator (indirectly)

Date: October 2022

Summary: The Philanthropic Advisor is responsible for attracting, retaining and obtaining outright and planned gifts from donors by understanding, serving, advising, and engaging them to achieve their philanthropic goals.

Responsibilities and Expected Outcomes:

- Actively cultivate relationships within an assigned portfolio of donors to inspire and engage their philanthropic interests and goals. Donors may include individuals, families, corporations, non-profit organizations, and distribution committees (such as supporting organizations, advised and scholarship funds).
- Collaborate with other Advancement staff on joint opportunities for cultivation and engagement where appropriate. Focus on attracting additional gifts from assigned donors.
- Collaborate across the Advancement Team on initiatives related to the Strategic Plan. These include working with the Center for Philanthropy staff and the Senior Director, Equity Initiatives, and others.
- Serve as the primary contact for assigned donors regarding the status of their funds and fund grantmaking in accordance with the Foundation's core and enhanced service options and fee structure.
- Make effective presentations to existing donors, new prospects, boards of directors and development and investment committees, communicating the full capabilities and accomplishments of the foundation.
- Proactively align donor interests with grantmaking opportunities, including partnership grants with the foundation where appropriate. Respond to donor requests for information and serve as a link to foundation resources.
- Encourage and facilitate donors use of the interactive online service that provides donors with access to fund information and information about grantmaking opportunities through the Foundation's website.



- Lead personalized sessions for donor families, focusing on multigenerational perspectives and establishing a family vision and mission statement for their philanthropic legacy.
- Actively collaborate with Philanthropic Services and Advancement colleagues on team-wide initiatives and events.
- Assist Director, Philanthropic Services on strategic projects, as assigned.
- Participate as a member of cross-disciplinary teams with foundation colleagues as requested on special assignments that serve to enhance the foundation's advancement activities.

Essential Qualifications, Credentials and Technical Skills required:

- A bachelor's degree and five to seven years' experience in a service environment where responsibilities included providing philanthropic advice and personalized service to a diverse group of high-net-worth donors/clients. Additional credentials are a plus.
- Demonstrated experience attracting, retaining, and managing a portfolio of donors/clients.
- Proven ability to build successful and lasting relationships and interact effectively with existing and prospective donors/clients, community leaders, professional advisors and representatives from for-profit and nonprofit organizations.
- Proven ability to successfully manage multiple complex projects simultaneously.
- Experience with creating and maintaining programs and communications designed to steward donors as a group, matching the approach to specific subsets within the donor population.
- Experience working as part of a multidisciplinary team and working effectively with persons and communities from diverse cultural, social, and ethnic backgrounds and age groups.
- Proven ability to promote teamwork and collaboration amongst peers, both departmentally and throughout an organization.
- Proficiency in utilizing technology to conduct research, provide information and/or services as well as video meeting/conferencing and team collaboration tools. Intermediate proficiency in all Microsoft Office programs and working knowledge of database programs.
- Exceptional writing and presentation skills.



Other Highly Desirable Qualifications Include:

- Knowledge of fund development, planned giving, and philanthropy, and the ability to knowledgably assist donors in formulating plans, goals and/or strategies for their philanthropic giving.
- Knowledge of the Greater Cleveland nonprofit community and the ability to research areas of interest on behalf of donors.

OUR COMMITMENT TO EQUAL OPPORTUNITY & DIVERSITY, EQUITY, AND INCLUSION:

The Cleveland Foundation exists to enhance the quality of life for all citizens of Greater Cleveland. The ability to carry out our mission and to foster our commitment to diversity, equity and inclusion can best be pursued if our workforce, grantees, donors, partners, and governing body are inclusive of individuals of diverse backgrounds, beliefs, and perspectives.

We believe that diversity encompasses, but is not limited to, age, color, education, ethnicity, family or marital status, gender, gender identity or expression, language, national origin, physical and mental abilities or characteristics, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and/or other characteristics that make an individual unique.

The Cleveland Foundation is committed to equal employment opportunities for all, and our policy is to ensure that employees are selected, developed, retained and promoted based on the individual's ability and job performance, and without regard to that individual's status or characteristics protected by federal, state or local law.

PAY AND BENEFITS:

Based on the foundation's compensation program, estimated annual salary for this position may be anywhere between high \$70k's and low \$90k's, based on the academic, professional and community experiences and credentials of a candidate. Consistent with our commitment to equal employment opportunities, the Foundation determines an employee's compensation without regard to that individual's status or characteristics protected by federal, state, or local law.

The foundation offers an exceptional benefits package including medical, dental, vision, identity theft, accident/critical care, life and disability coverage, a comprehensive wellness program, an employee assistance program, a fully vested 403(b) retirement plan, 10 paid holidays and, for exempt positions, 15 days of vacation and 12 sick days, prorated the first year of service based on date of hire.

TO APPLY:

If you are interested in applying for this position, please submit your resume and cover letter [here](#) as soon as possible. This posting will remain active until the position is filled. We regret that we cannot respond personally to each applicant.



Note: Hours worked will be largely remote, until we move into our new headquarters building late in 2022. The Cleveland Foundation requires all employees to be fully vaccinated against COVID-19 and provide valid proof of vaccination unless a documented medical or religious exemption is approved. All information provided will be kept strictly confidential.