Community Foundation *for* Southern Arizona (CFSA)

JOB DESCRIPTION

VP for Philanthropy

|  |  |
| --- | --- |
| **Position** | VP for Philanthropy |
| **FLSA Status** | Exempt – Full Time |
|  |  |
| **Reports To** | CFSA's President and CEO |
| **Organization Profile** | CFSA was founded in 1980 and is a leading organization in Southern Arizona for effective philanthropy and the primary knowledge center and strategic resource for donors and the nonprofit community in the region. Known a leader in partnering with southern Arizona’s nonprofits through the Center for Healthy Nonprofits and a centrally located and welcoming community campus that serves as a hub of convening and collaboration. |
| **Position Purpose & Overview** | The VP for Philanthropy is responsible for elevating and managing all of CFSA’s fund development functions through the Philanthropy Team. The Vice President will oversee the development and implementation of donor acquisition strategies as well as ensure long term engagement through effective donor stewardship. The Vice President will lead efforts to enhance external partnerships with wealth managers and professional advisors. The VP will also personally manage a portfolio of donors and prospects and will oversee the receipt of complex contributions, e.g., gifts of real estate, closely held securities. As head of the department, the VP for Philanthropy will develop and  ensure execution of all fund development strategies including prospect identification, qualification, cultivation, solicitation, and stewardship in partnership with President/CEO and the CFSA team. |
|  |  |
| **Duties & Responsibilities** | * Create and implement multi-year donor cultivation plans that engages senior leadership, Board members, and staff to ensure CFSA is on track to achieve the short-term and long- term asset growth objectives of the foundation. * Serve as a member of the Senior Leadership Team responsible for department planning, budgeting and culture building in the context of CFSA’s overall priorities and resources. * Develop, refine, and evaluate strategies for donor cultivation and engagement utilizing data and feedback; report regularly to the President and Board on progress toward goals. * Work closely with the President/CEO and staff to develop and implement professional advisor cultivation and engagement strategies with the aim of increasing referrals. * Build and sustain a personal portfolio of donors by cultivating new relationships with donors directly and through professional advisor referrals. * Create and execute a plan to build out the donor services and stewardship functions of foundation, in partnership with the rest of the CFSA team, to ensure these activities are consistent, timely, accurate, and meaningful. * Develop a visible and effective external profile, regularly presenting on behalf of CFSA at large and small gatherings of influential stakeholders including, donors, prospective donors, professional advisors, and business leaders, and attending various offsite community functions hosted by donors and/or nonprofit partners. * Work with Marketing Team to develop a comprehensive communications plan to cultivate new donors and engage and inspire existing donors through regular printed communication, annual reports, presentations, and events. In partnership, develop collateral and marketing materials for donors and prospects. * Work with the Community Investment Team to develop strategies to engage donors in the programmatic and grantmaking work of the Foundation. * Model CFSA’s culture with behaviors that support philanthropy, inclusion, and service. * Identify, cultivate, solicit, and build relationships with individuals and professional advisors located within or having connections to the Foundation’s service area with a goal of increasing annual charitable donations, and major and planned gifts. * Implement moves management plans for both current and deferred givers, including the development and implementation of strategies to encourage existing fund holders to build their fund and leave estate gift to the foundation. |

|  |  |
| --- | --- |
|  | * Serve directly or through a team member as liaison to CFSA Properties Board and the Professional Advisor Committee. |
| **Qualifications** | * Minimum of 5-7 years related work experience including time in fundraising or planned giving or estate planning, or equivalent. * Proven ability to advise individuals and families on their philanthropic decision making and planning. * Proven ability to successfully manage a portfolio of major gift prospects; ability to coach staff in the development and successful management of a major gift portfolio. * Ability to construct, articulate, and implement annual strategic development plan. * Demonstrated ability to influence and engage a wide range of donors and prospects and build long-term relationships. * Expertise in the understanding of complex gifts, particularly those coming from estates. * General knowledge of securities markets and how trusts and estates are administered. * Knowledge of and comfort with technology, including familiarity with computer-based fund- raising support systems. * Ability to understand and communicate philanthropy-relevant information related to finance, accounting, and investment strategies to a wide range of audiences, including donors and professional advisors. * Ability to interact well with a diverse range of people. * Experience leading a customer service focused team. * Strong organizational and time management skills. * Excellent verbal and written communication skills; strong collaboration and influencing skills. * Ability to travel locally and to select national conferences. * Commitment to creating an inclusive atmosphere where differences are understood, valued, and respected; an understanding and appreciation of the diversity found within southern Arizona including the ability to work with all individuals regardless of race, color, gender, sexual orientation, sexual identity, age, religion, marital status, disability, national origin, and   military status. |
| **Preferred:** | * Financial planning expertise. |
| **General** | The above statements are intended to describe the general nature and level of work being performed by an employee assigned to this job. This is not intended to be an exhaustive list of all  responsibilities, duties and skills required of personnel incumbent in this position. |
|  |  |
| **Americans with Disability Specifications** | Physical Demands  The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.  While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; balance; stoop, kneel, crouch or crawl; talk or hear; taste or smell. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.  Work Environment  Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.  While performing the duties of this job, the employee is usually not exposed to weather conditions prevalent at the time.  The noise level in the work environment is usually moderate. |
|  |  |
| **Compensation** | To be determined based on qualifications and experience. |
|  |  |
|  |  |

Page 2 of 3

|  |  |
| --- | --- |
| **At Will Relationship** | This document does not create an employment contract, implied or otherwise, other than an “at will” relationship which means that either you or CFSA may terminate the relationship at any time, with or without notice, and with or without cause. |
|  |  |
| **Last Updated** | September 29, 2021 |

I have read and understand this explanation and job description and have received a copy for my records.

Printed Name

Signature Date

Page 3 of 3