

Position Description

Position	Philanthropic Advisor
Department	Philanthropy
FLSA Status	Full Time, Exempt
CFSA Grade	18
Reports To	Vice President for Philanthropy
Location	The position is located in Tucson, Arizona. As a place-based organization, the selected candidate is expected to reside in Southern Arizona.
Organization Profile	<p>Founded in 1980, the Community Foundation for Southern Arizona has supported Southern Arizona with over \$260 million in grants and scholarships, stewarding the philanthropic legacy of our community's generous donors and increasing the breadth and depth of resources available to nonprofit organizations in our region.</p> <p>The impact we make is a collective one, with funds held by individuals, families, and businesses with unique interests, ideas, and passions. Our work touches every aspect of daily life, including animal welfare, arts and culture, community development, education, environment, health and human services, and more.</p> <p>In addition to the support provided to Southern Arizona nonprofits through donor-advised grants and competitive grantmaking, CFSA also partners with nonprofits through its Center for Healthy Nonprofits and offers beautiful and affordable office, meeting, and event space at its centrally located Community Foundation Campus.</p>
Position Purpose & Overview	<p>The Philanthropic Advisor helps to drive CFSA's development efforts and major gifts fundraising activities by identifying, cultivating, soliciting, and stewarding both current donors and fund holders as well as prospective donors and fund holders. The Philanthropic Advisor is also responsible for directing and supporting engagement efforts for donors and fund holders.</p> <p>The Philanthropic Advisor is central to advancing CFSA's mission through strong donor relationships and purposeful philanthropic engagement. The ideal candidate is forward-thinking, innovative, and highly collaborative. They excel at building relationships and networks and are motivated by attracting new donors, supporting existing donors, understanding the nonprofit landscape, and growing philanthropic engagement to expand the impact of CFSA's donors across Southern Arizona.</p>
Duties & Responsibilities	<p>Fund Development, Donor Stewardship, & Major Gifts (40%)</p> <p>The Philanthropic Advisor supports all fund development activities. This includes implementing donor acquisition strategies and providing ongoing stewardship and recognition to foster long-term donor commitment. The Philanthropic Advisor serves as the primary strategist for assigned donors, guiding relationships from first contact through all giving processes, including potential legacy giving. These duties</p>

include:

- Manage assigned donors and prospects through the full donor cycle, including cultivation and solicitation, encouraging fund holders to consistently add to their funds and expand their use of philanthropic planning vehicles.
- Support donors' leadership in Southern Arizona and help them stay on track toward philanthropic goals (including family engagement where relevant).
- Deliver a premier donor experience in partnership with colleagues so donors/fund holders have the tools to be effective philanthropists.
- Respond to donor/fund holder inquiries; answer questions, troubleshoot issues, and guide use of CFSA systems/tools.
- Refer donors to volunteer opportunities and serve as a general philanthropy resource.
- Research and identify prospective donors using screening and related tools.
- Assist with the creation, execution, and documentation of moves management activities for donors and prospects.
- Support the administration and grantmaking of special committee donor-advised funds, as assigned by the Vice President for Philanthropy.

Donor Engagement, Community Partnerships, & Philanthropic Advising (40%)

Working across departments, the Philanthropic Advisor develops and expands opportunities for donor learning, volunteerism, and philanthropy throughout Southern Arizona. This individual builds on current engagement approaches while creating new strategies that strengthen involvement, advise on impactful philanthropy, and connect donors with relevant CFSA opportunities and programming.

The position works directly with donors to explore and deepen their philanthropic values, increase their understanding of local needs, and connect their passions to mission-driven opportunities. In parallel, the Philanthropic Advisor works internally with CFSA teams and may serve a liaison role for the Philanthropy team with one or more of CFSA's internal departments. This includes work to:

- Plan and execute donor engagement opportunities.
- Design and manage learning programs that help philanthropists understand community needs, with special attention to smaller, rural, less-resourced, and marginalized-serving nonprofits.
- Design and launch new programs for emerging philanthropists.
- Develop and support efforts to increase donor knowledge of charitable giving options and community initiatives through events, networking, and communications.
- Design and implement regular survey/feedback tools to assess donor satisfaction and emerging interests.
- Provide training and support to CFSA staff and professional advisors related to grantmaking consultation, family philanthropy, and individualized

	<p>philanthropic strategy.</p> <ul style="list-style-type: none"> • Participate in reporting progress on CFSA grants to external funders; track requirements and ensure timely completion. • Alongside the Vice President of Philanthropy, develop KPIs for donor engagement and learning and drive measurable outcomes tied to foundation goals. • Partner with mission-aligned organizations to create donor engagement and education opportunities. • Research and prepare opportunities that align donors' interests with high-impact community needs and initiatives. • Maintain a broad, current understanding of community needs and apply this knowledge to support donor strategic philanthropy. • Support planning and execution of CFSA donor and community events. • Use events as a platform for donor learning, engagement, stewardship, and pipeline development. <p>Department Operations & Special Projects (20%)</p> <p>Finally, the Philanthropic Advisor position will assist with department operations, culture, and special projects, including:</p> <ul style="list-style-type: none"> • Coordinate, track, and manage philanthropy special projects and other assignments as needed. • Model CFSA's culture of philanthropy, inclusion, and service in day-to-day behaviors. • Attend organizational and external events as required, including occasional evenings/weekends and infrequent local travel.
<p>Experience, Qualifications, and Skills</p>	<p>Minimum Qualifications</p> <ul style="list-style-type: none"> • Bachelor's degree or an equivalent combination of education and relevant professional experience. • A minimum of 3-5 years of related work experience is required, including experience in relationship management, development, fundraising, donor and partner relations, philanthropy or a related field. • Experience using technology to improve business efficiencies in relationship management, including tracking and managing information in CRM (relationship management) databases. • Experience setting budgets and making basic financial projections. • Experience creating fund development plans, as well as setting and meeting fundraising goals and metrics. • Ability to handle confidential information with discretion and professionalism. • Ability to work effectively in a collaborative, cross-functional, and hybrid work environment. • Experience managing and working with volunteer leaders – building alignment and developing shared strategies for accomplishing work collectively.

	<ul style="list-style-type: none"> Ability to interact well with a diverse range of people. 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. <p>Preferred Qualifications</p> <ul style="list-style-type: none"> Experience working with (or working knowledge of) planned giving vehicles preferred. Bilingual (Spanish speaking) preferred.
General	<p>We know there are great candidates who will not fit everything we have described above or who have important skills we have not considered. If that's you, do not hesitate to apply and tell us about yourself.</p> <p>The above statements are intended to describe the general nature and level of work 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.</p>
Americans with Disability Specifications	<p><u>Physical Demands</u></p> <p>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 these essential functions.</p> <p>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; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; taste or smell. The employee must occasionally lift and 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.</p> <p><u>Work Environment</u></p> <p>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 these essential functions.</p> <p>While performing the duties of this job, the employee is usually not exposed to weather conditions prevalent at the time.</p> <p>The noise level in the work environment is usually moderate.</p>

Compensation	<p>The salary range for this position is \$86,000 – \$96,000, commensurate with experience. The Community Foundation for Southern Arizona offers an outstanding total rewards package to meet employees’ health and wellness needs, promote professional development and career growth opportunities, recognize performance, and provide retirement resources.</p> <p>CFSA offers full-time employees:</p> <ul style="list-style-type: none"> • 401(k) retirement with employer match. Eligible after 3 months of full employment with full vesting, with CFSA contributing 4% of salary and matching up to an additional 4% more upon establishment of the account, for a total potential employer contribution of up to 8% with 4% guaranteed. • Health insurance: CFSA covers 80% of the employee premium and 50% of all dependent coverage costs under the base plan. • Dental and vision insurance: CFSA covers 90% of the employee premium. • Life, accident, death, and dismemberment insurance: CFSA covers 100% of the employee premium. • Short-term and long-term disability: CFSA covers 100% of the employee premium. • Ten paid holidays, twenty days of paid time off in year one (increases with additional years of service), and one day of paid community volunteerism. • Paid family leave. • Beautiful, modern, art-filled campus and other amenities. • A flexible work environment that supports a healthy work/life balance and hybrid work options. <p>This is a summary of current CFSA benefits and eligibility and may change over time.</p>
How To Apply	Email your cover letter and resume to hr@cfsaz.org . Please put “Philanthropic Advisor” in the subject field.
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