



# Community Foundation for Southern Arizona

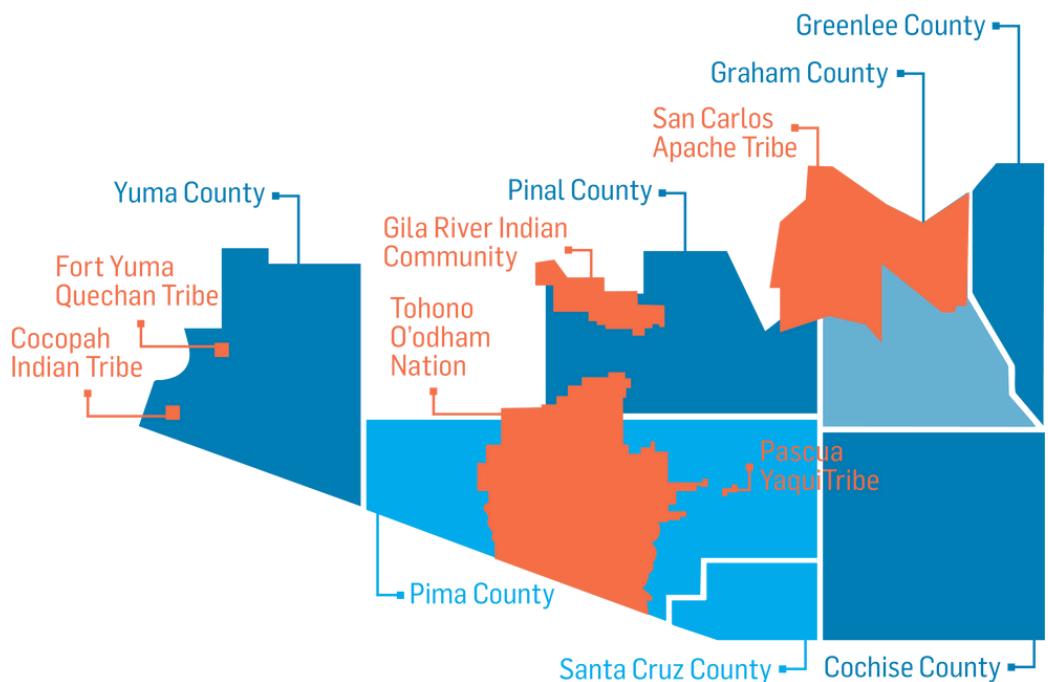
## Position Guide

Philanthropic Advisor



## Building a Thriving Southern Arizona

The Community Foundation for Southern Arizona (CDSA) has been dedicated to making Southern Arizona a better place for all since 1980. As the region's largest grantmaker, CDSA serves Pima and Santa Cruz counties while supporting a broader seven-county region—including Cochise, Yuma, Graham, Greenlee, and Pinal counties—as well as six tribal nations: Cocopah, Fort Yuma Quechan, Gila River, Pascua Yaqui, San Carlos Apache, and Tohono O'odham.



# Generosity Grown in Southern Arizona

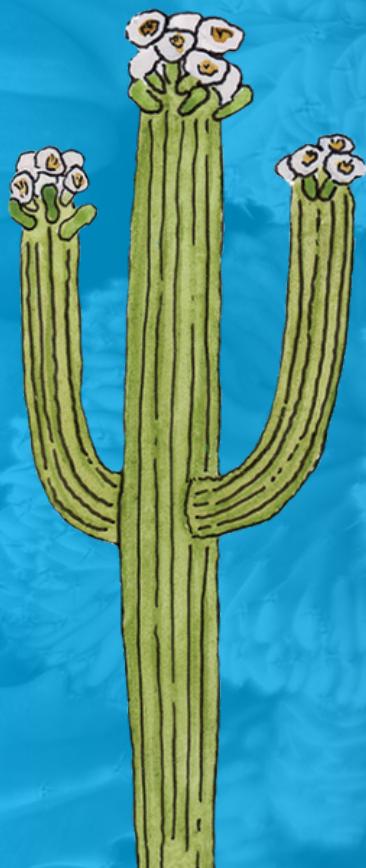
CFSA partners with donors to turn generosity into meaningful impact, connecting people to the causes they care about and supporting solutions shaped by those who know our communities best. By bringing together individuals, families, businesses, and nonprofits, we invest in a stronger, more vibrant Southern Arizona for all.

**\$291,000,000**

invested in Southern Arizona through Grants and Scholarships

**\$223,000,000**

in assets, ensuring resource for future generations.



## STRATEGIC PRIORITIES

1

### Bold Aspirations

Serve as a leader and resource for the community to achieve bold aspirations.

2

### Impactful Philanthropy

Position CFSA as a preferred, welcoming, and inclusive partner and resource for community-minded donors.

3

### Vital Nonprofit Sector

Invest in Southern Arizona's nonprofit sector to empower nonprofits to tackle community challenges effectively.

## VALUES



Community



Generosity



Trust



Savvy



Adaptability

# Our Services

CFSA works directly with individuals, families, and businesses to inspire and enact long-term solutions for our communities' most pressing problems through philanthropy.



## Individuals and Families

CFSA offers personal support to help you reach your giving goals. Our philanthropy team learn what matters to you and recommends strategies that match your vision, whether you're giving now or planning for the future. We provide expertise and opportunities to help increase the impact of your generosity.

## Nonprofit Organizations

Through unrestricted grantmaking, targeted education, peer roundtables, and opportunities to convene at the Community Foundation Campus, CFSA is empowering Southern Arizona's nonprofits to tackle today's complex community challenges. CFSA continues to innovate and adapt to the changing needs of today's nonprofit sector.

## Southern Arizona Businesses

CFSA helps businesses contribute to a thriving Southern Arizona. They identify giving opportunities that align with each company's mission and provide expert guidance throughout the grantmaking process, making it easier for businesses to maximize their impact in the community.

## Private Foundations

Established family and private foundations find that they can achieve the same lasting impact by opening a donor advised fund with CFSA, while avoiding the burdensome reporting requirements and potential taxes. A donor advised fund can be used now or later, and a succession plan helps engage the next generation in giving.

## Professional Advisors

Individuals rely on professional advisors — attorneys, financial planners, CPAs, trust officers, investment advisors, and insurance agents — to guide their financial and estate plan decision-making. CFSA partners with professional advisors to create giving options that maximize clients' tax benefits and honor their philanthropic goals.

## Our Community Work

CFSA initiatives unite donors, nonprofits, and community partners to strengthen Southern Arizona. Through strategic grantmaking, we address critical needs, foster innovation, and enhance the quality of life for all.

The African American Legacy Fund works to improve the quality of life for African Americans in Southern Arizona by promoting philanthropy and strengthening the community through collaboration.

The Asian Pacific Islander Desi American Fund builds strong communities through education, engagement, and collaboration.

The Center for Healthy Nonprofits strengthens the Southern Arizona nonprofit community by offering free and reduced-cost capacity-building workshops and training for nonprofit professionals and volunteers.

The Community Foundation Campus opened in January 2019 as an accessible space to increase nonprofit networking, partnerships, and shared learning through reservable event and office space for local nonprofits.

The CORE Grants Program provides general operating support to Southern Arizona nonprofits. CORE Donor Collaborators amplify the impact by funding grants and working with CFSA to understand community needs and the nonprofits serving them.

The Lesbian Gay Bisexual Transgender Queer (LGBTQ+) Alliance Fund works to foster charitable giving in support of innovative programs and initiatives that benefit the LGBTQ+ community in Southern Arizona.

The Local News Initiative of Southern Arizona, also known as Press Forward Southern Arizona, was established in 2023 to increase access to local news and information. Grants support the delivery of nonpartisan, reliable civic news and information.

Launched in 2022, the Nonprofit Solar Project offers local nonprofits a grant funding to meet a significant portion of their energy needs through solar power.

The Solutions-Focused Community Book Club was created in 2023 to bring together community members from all walks of life who are interested in connecting, learning from each other, and building momentum toward positive change.

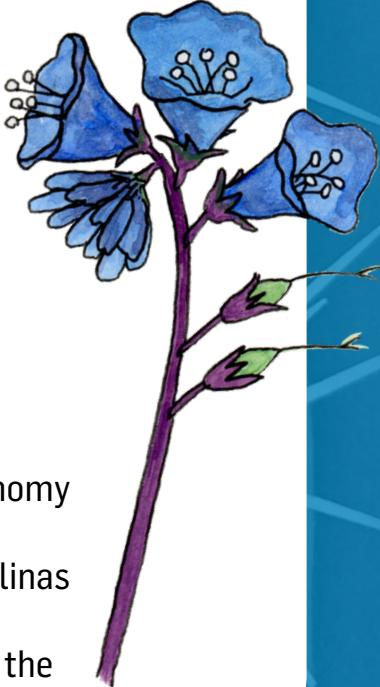




The Community Foundation for Southern Arizona is based in Tucson, Arizona, and serves communities across the region.

### About Southern Arizona

- Enjoy more than 300 days of sunshine each year, perfect for hiking, biking, swimming, rock climbing, running, and golf.
- Experience a region rich in history and culture, with world-class museums, year-round festivals, events, and sports.
- Explore surrounding mountain ranges and the stunning Sonoran Desert.
- Access a mix of highly rated public and private schools, including the University of Arizona.
- Take easy weekend trips to Phoenix, Sedona, or Southern California.
- Savor incredible cuisine—Tucson is the first UNESCO City of Gastronomy in the U.S.
- Discover diverse wildlife, from saguaros and desert tortoises to javelinas and a variety of birds.
- Enjoy exceptional stargazing opportunities—the region has some of the darkest skies in the U.S.



# Philanthropic Advisor

## POSITION OVERVIEW

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.

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.

## KEY DUTIES & RESPONSIBILITIES

### **Fund Development, Donor Stewardship, & Major Gifts (40%)**

- 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 move 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%)**

- 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 philanthropic strategy.
- 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 the planning and execution of CFSA donor and community events.
- Use events as a platform for donor learning, engagement, stewardship, and pipeline development.

### **Department Operations & Special Projects (20%)**

- Coordinate and support philanthropy department projects and initiatives.
- Contribute to a culture of inclusion, service, and collaboration.
- Attend organizational and external events, including occasional evenings, weekends, and local travel.

## **EXPERIENCE, QUALIFICATIONS, AND SKILLS**

### **Minimum Qualifications**

- 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.
- 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.

### **Preferred Qualifications**

- Experience working with (or working knowledge of) planned giving vehicles preferred.
- Bilingual (Spanish speaking) preferred.

## **AMERICANS WITH DISABILITIES ACT SPECIFICATIONS**

### **Physical Demands**

The physical demands described here are representative of those required to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform 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; climb stairs; 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, peripheral vision, depth perception, and the ability to adjust focus.

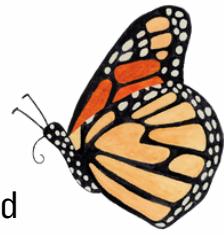
### **Work Environment**

The work environment characteristics described here are representative of those an employee must meet 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.

## CANDIDATE PROFILE

A strong program management background and the ability to work independently across diverse teams and committees are essential skills for this role. The ideal candidate will have an understanding of the experiences of historically marginalized racial groups in the U.S., particularly Black, Indigenous, Asian-American, and Latinx groups, and how CFSA's work intersects with those experiences. As a place-based organization, the selected candidate must reside in Tucson, Arizona.



We know some great candidates will not fit everything we have described above, or who have important skills we have not considered. If that's you, please apply and tell us about yourself.

## HOW TO APPLY

To apply, please email your cover letter and resume to [hr@cfsaz.org](mailto:hr@cfsaz.org). Please put "Philanthropic Advisor" in the subject field. Visit [cfsaz.org/employment](http://cfsaz.org/employment) to view the complete job description.

## COMPENSATION

The hiring range for this position is \$86,000 – \$96,000, commensurate with experience.

CFSA offers full-time employees:

- 401(k) retirement plan with employer match. Eligible after the first three full months of employment with full vesting, with CFSA contributing 4% of salary immediately and matching up to 4% more after one year, for a total potential match of up to 8%.
- Health insurance: CFSA covers 80% of the employee's premium and 50% of all dependent coverage costs under the base plan.
- Dental and vision insurance: CFSA covers 90% of the employee's premium.
- CFSA fully covers employee life, accident, death, and dismemberment insurance premiums.
- CFSA covers 100% of the employee's short- and long-term disability insurance premiums.
- Ten paid holidays and twenty days of paid time off in year one.
- Paid family leave.
- Flexible, hybrid work supporting a healthy work/life balance.

## TOTAL REWARDS

The Community Foundation for Southern Arizona offers an outstanding total rewards package that meets employees' health and wellness needs, promotes professional development and career growth, recognizes performance, and provides retirement resources.

### Health & Wellness

- Medical
- Dental
- Life Insurance
- Disability
- Employee Assistance Program

### Financial

- Base Pay
- Team Bonus
- Retirement Plan with match
- Paid Time Off

### Culture

- Mission-driven
- Rewarding Work
- Inclusion, Diversity, Equity, and Access
- Hybrid Work Model

### Training

- Training and Development
- Career Growth
- Training Budget