

## Position Description

<b>Position</b>	Senior Manager, Philanthropic Strategy & Operations
<b>FLSA Status</b>	Full Time, Exempt
<b>Department</b>	Philanthropy
<b>Reports To</b>	VP of Philanthropy, with a dotted line to the Chief Operating Officer
<b>CFSA Grade</b>	16
<b>Location</b>	The position is located in Tucson, Arizona. As a place-based organization, the selected candidate is expected to reside in Southern Arizona.
<b>Organization Profile</b>	Founded in 1980, the Community Foundation for Southern Arizona (CFSA) has supported Southern Arizona with over \$245 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. 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. In addition to the support provided to Southern Arizona nonprofits through 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.
<b>Position Purpose &amp; Overview</b>	<p>The Senior Manager, Philanthropic Strategy &amp; Operations (PSO) serves as a strategic operational and data partner to the Philanthropy team, supporting donor engagement, financial and engagement reporting, portfolio management, and fundraising effectiveness through strong systems, data governance, analysis, and prospect development practices. This role blends administrative excellence with analytical and strategic support, ensuring the philanthropy and CFSA leadership team have accurate data, actionable insights, and efficient processes to deepen relationships with donors, fund holders, prospects, and professional advisors.</p> <p>The position plays a central role in managing data in CFSA's CRM system, supporting portfolio strategy, conducting basic prospect research and management, and maintaining consistent, high-quality donor and opportunity records that enable thoughtful philanthropic activity. This role is ideal for someone who enjoys combining relationship-centered work with data analysis, systems thinking, and operational strategy in a mission-driven and community-focused environment. This role directly reports to the VP for Philanthropy, with a dotted line reporting relationship to the Chief Operating Officer on matters of systems and general operations support.</p>
<b>Key Duties &amp; Responsibilities</b>	<p><b>Portfolio Management &amp; Prospect Development (~35%)</b></p> <ul style="list-style-type: none"> <li>• Provide ongoing portfolio support to Philanthropy staff by managing donor and prospect portfolios within CFSA's CRM system (Foundant CSuite), including assisting the team with tracking engagement activity, meaningful conversations, and next steps.</li> <li>• Conduct basic prospect research to support philanthropy efforts, including reviewing public information, philanthropic interests, giving history, and alignment with CFSA priorities.</li> </ul>

- Assist in identifying, segmenting, and prioritizing prospective donors, volunteers, and professional advisors in collaboration with relationship managers.
- Support pipeline management by helping to establish processes and best-practice approaches for managing and analyzing “opportunities” in CSuite, ensuring clarity around stage, strategy, and follow-up.
- Prepare portfolio summaries, prospect briefings, and one-page fund or donor profiles to support cultivation and stewardship conversations for CFSA Leadership and the Philanthropy Team.

**CRM, Data Governance, & Analytics (~35%)**

- Serve as a primary owner of philanthropy-related data governance in CSuite, with particular focus on profiles, relationships, and opportunities.
- Establish, document, and enforce standards for data entry, naming conventions, opportunity tracking, and record maintenance to ensure data accuracy and consistency.
- Act as the primary point person for philanthropy-related data entry, updates, and quality control, including donor, fund holder, professional advisor, and prospect records.
- Work with outside vendors on data appends if/when needed.
- Create and maintain reports and dashboards to support fundraising strategy, portfolio review, outreach activity, and progress toward departmental goals.
- Analyze data trends to provide strategic insights that support decision-making, planning, and performance improvement within the Philanthropy team.

**Reporting, Outreach, & Stewardship Support (~20%)**

- Create and deliver reports to support Philanthropy Department outreach, including mailing lists, event invitations, donor cultivation tracking, and stewardship activities.
- Proactively prompt and track outreach activities by Philanthropy staff, ensuring timely follow-up and documentation in the CSuite.
- Support preparation of fund review materials, donor summaries, and stewardship reports for internal use, board reporting, and donor-facing communications.
- Track and report on departmental metrics aligned with CFSA’s strategic plan and Board of Trustees reporting needs.

**Other Duties (~10%)**

- Serve as a general point of contact for donor and fund holder inquiries; respond to routine requests and coordinate referrals to relationship managers for engagement and resolution.
- Communicate professionally with donors, fund holders, attorneys, executors, trustees, and professional advisors to support fund administration and relationship continuity.
- Work closely with the Finance team on fund reviews, donor service inquiries, and fund statement mailings.
- Assist with administration of CFSA’s annual campaign.
- Participate in ongoing CFSA committees and workshops focused on technology and process improvement.
- Contribute to team coverage during holidays and peak activity periods.

	Some evening and weekend availability for donor events and CFSA-sponsored activities is required. Infrequent travel, typically in Southern Arizona, will be necessary.
<b>Experience, Qualifications, and Skills</b>	<p><b>Minimum Qualifications</b></p> <ul style="list-style-type: none"> <li>• Bachelor’s degree or an equivalent combination of education and relevant professional experience.</li> <li>• 4+ years of experience in nonprofit development, philanthropy operations, advancement services, prospect development, or a related role.</li> <li>• Demonstrated experience working in a complex CRM system (e.g., Foundant CSuite, Salesforce, Raiser’s Edge, Blackbaud CRM, or similar), including managing donor/prospect profiles, portfolios, opportunities, and custom reports.</li> <li>• Experience supporting fundraising or donor engagement efforts through data management, reporting, portfolio support, or operational/process-driven coordination.</li> <li>• Strong organizational skills with the ability to manage multiple priorities, meet deadlines, and maintain high attention to detail.</li> <li>• Excellent written and verbal communication skills.</li> <li>• Ability to handle confidential information with discretion and professionalism.</li> <li>• Ability to work effectively in a collaborative, cross-functional, and hybrid work environment.</li> <li>• 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.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Experience in prospect development, including prospect research, portfolio analysis, pipeline tracking, or moves management.</li> <li>• Advanced proficiency in data analysis and reporting tools (e.g., Excel, dashboards, data visualization, CRM reporting).</li> <li>• Experience developing and documenting operational processes or data governance standards.</li> <li>• Familiarity with community foundation environments, donor-advised funds, or complex philanthropic organizations and structures.</li> <li>• Experience partnering closely with relationship managers or fundraisers to support strategy and decision-making.</li> <li>• Familiarity with prospect research tools (e.g., Donor Search, iWave, WealthEngine, or similar).</li> <li>• Demonstrated ability to translate data into insights that inform fundraising strategy and outreach.</li> </ul>
<b>General</b>	<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 is you, do not hesitate to apply and tell us about yourself. 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 in this position.</p>
<b>Americans with Disability</b>	<p><u>Physical Demands</u> The physical demands described here are representative of those that</p>

<p><b>Specifications</b></p>	<p>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.</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>  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 accommodation 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.</p>
<p><b>Compensation</b></p>	<p>The salary range for this position is \$70,000-\$78,000, 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"> <li>• 401(k) retirement plan with employer match. Eligible after 90 days with full vesting, with CFSA contributing 4% of salary immediately and matching up to 4% more after one year of employment, for a total potential match of up to 8%.</li> <li>• Health insurance: CFSA covers 80% of the employee premium and 50% of all dependent coverage costs under the base plan.</li> <li>• Dental and vision insurance: CFSA covers 90% of the employee premium.</li> <li>• Life, accident, death, and disability insurance: CFSA covers 100% of the employee premium.</li> <li>• Short-term and Long-term disability insurance: CFSA covers 100% of the employee premium.</li> <li>• Ten paid holidays and twenty days of paid time off in year one (and increased over time via years of service)</li> <li>• One day of dedicated PTO for Community Service/Volunteerism</li> <li>• Paid family leave.</li> <li>• Beautiful, modern, art-filled campus, and other amenities.</li> <li>• A flexible work environment that supports a healthy work/life balance and hybrid work options.</li> </ul> <p>This is a summary of current CFSA benefits and eligibility and may change over time.</p>
<p><b>Last Updated</b></p>	<p>February 2026</p>