



PHILANTHROPIC SERVICES OFFICER - JOB DESCRIPTION

Job Purpose: The Philanthropic Services Officer reports to the Senior Philanthropic Services Officer and primarily provides philanthropic services to individual fund-holders, corporate advised funds and private foundations. The Philanthropic Services Officer will serve as the primary contact for a portfolio of fund holders and provide individualized assistance to fund holders and other partners. The Philanthropic Services Officer assists with prospect research, donor development special events, sponsorships, affiliate funds and scholarships. Based on the duties described below, this is an exempt position.

Primary Duties and Responsibilities:

- Provides administrative support for the Foundation's philanthropic activities and supports the needs of the Philanthropic Services Department.

Philanthropic Services

- Works with a portfolio of existing funds and fundholders to provide ongoing philanthropic services and increase level of donor engagement.
- Develops and maintains comprehensive and accurate information regarding donor advisor interests and preferences.
- Participates in orientation meetings with new donor advisors to understand their interests and intentions.
- Schedules annual reviews with existing donor advisors.
- Plans and implements philanthropic educational programs and activities to develop relationships with donor advisors and prospects.
- Provides individualized philanthropic services as requested by fund holders.
- Facilitates family philanthropy meetings as requested.
- Serves as a contact for fund holders, able to answer questions about their funds and the Foundation's work in general.
- Maintains cross-functional working relationships with other departments as needed for timely and full-service philanthropic support to fund holders.
- Produce and send quarterly fund statements to donor advisors.
- Process gifts and gift acknowledgement letters as needed.
- Assists with special events and securing sponsorships.
- Maintain donor database records, prospect management and performs research to assist the Senior Vice President of Philanthropic Services to identify prospects as needed.

- Serve as staff liaison to foundation's affiliate fund advisory boards serving regional populations within Monterey County. This includes working with community leaders to create fundraising plans, researching and setting funding priorities and guidelines, reviewing grant proposals and reports, and guiding advisory boards on awarding grants.
- Work with Scholarships and Community Impact Officer to provide philanthropic services to Scholarship Fund Holders as needed.

Grantmaking

- Receive and track grant requests, and perform due diligence from donor advised funds.
- Provides technical assistance for online data systems to nonprofits and donors.
- Monitors reporting requirements and payments for donor advised grants in conjunction with Grants and Data Specialist.
- Serve as liaison with Community Impact department staff to recommend grant and co-investment opportunities that support fund holders' philanthropic interests.

Other

- Supervise and monitor work of Philanthropic Services interns, volunteers and independent contractors, as needed.
- Manage and facilitate special projects, as assigned.
- Participate in ongoing training and professional development, including staying abreast of industry trends and their appropriateness for the Foundation's philanthropic services practice.
- Assists the President/CEO, Senior Philanthropic Services Officer and Senior Vice President of Philanthropic Services on other assignments as requested.

SKILLS/EXPERIENCE:

- Proven analytical, database, and reporting skills
- Relational database/donor management software experience
- Advanced computer and office administration skills
- Computer and office skills: MS Word, Excel, Outlook, and relational database experience
- Excellent attention to details and follow-through including proofreading and editing
- Strong communicator
- Strong organizational skills and ability to manage multiple projects
- Objective and critical thinker
- Strong problem solving skills
- Ability to work with or without supervision
- High level of customer service
- Inquisitive and proactive nature
- Ability to maintain the confidentiality of our donors