

Reports to: Director, Philanthropic Partnerships
Status: Exempt

Job summary

The **Philanthropic Advisor** is a key member of the Philanthropic Team, reporting to the Director of Philanthropic Partnerships. The role is focused on enhancing the donor experience and helping donors maximize the impact of their philanthropy. A trusted relationship builder, thoughtful listener, and curious philanthropic strategist, the Philanthropic Advisor seeks to understand what motivates individuals and families and helps translate their values and aspirations into meaningful charitable impact. The Advisor cultivates and stewards donor relationships, serves as a trusted resource and thought partner, and provides education and guidance on philanthropic strategies and opportunities. Through personalized engagement and collaboration with Gulf Coast colleagues and community partners, the Philanthropic Advisor helps donors make informed charitable decisions while strengthening their connection to Gulf Coast and the community it serves.

Essential Duties and Responsibilities

Donor Relationship Management and Experience

- Identify, cultivate, and grow relationships with a portfolio of current and potential donors.
- Develop and implement personalized stewardship plans to ensure long-term donor engagement and satisfaction.
- Provide exceptional donor service, responding promptly to inquiries and requests.
- Advise donors on philanthropic opportunities that align with their focus areas and Gulf Coast's mission.

Philanthropic Strategy and Education

- Guide donors in developing and implementing their philanthropic vision.
- Collaborate with other members of the Philanthropic team to educate donors on various giving vehicles and strategies to maximize their charitable impact.
- Collaborate with donors to create tailored giving plans that meet their charitable, financial, and personal goals.
- Stay informed about community needs and Gulf Coast's initiatives to effectively connect donors with meaningful giving opportunities.

Donor Engagement Initiatives

- Assist in planning and executing donor recognition and cultivation events.
- Represent Gulf Coast Community Foundation at donor, community, and organizational events, serving as a knowledgeable and welcoming ambassador for the Foundation.
- Host and engage donors, prospects, and other guests at Gulf Coast and community events, including managing event invitations, hosting the tables, welcoming attendees, facilitating introductions, and helping create a meaningful and personalized experience.
- Develop and deliver presentations on Gulf Coast's impact and giving opportunities.
- Create personalized materials and proposals for donors to illustrate the potential impact of their giving.

Internal Collaboration and Reporting

- Work closely with the Director, Philanthropic Partnerships to align donor engagement strategies with organizational goals.
- Collaborate with other departments to gather information on Gulf Coast's programs and impact to share with donors.
- Maintain accurate and up-to-date donor records in the organization's database.
- Prepare regular reports on donor engagement activities and outcomes.

Required Education and Experience

- Bachelor's degree in a relevant field such as Nonprofit Management, Business, or Communications.
- Minimum of three years of experience in donor relations, major gifts, or a related field in the nonprofit sector.
- Demonstrated success in cultivating and stewarding donor relationships.
- Strong understanding of various charitable giving vehicles and philanthropic trends.
- Proficiency in donor management software and CRM systems.
- Excellent interpersonal and communication skills, with the ability to build trust and rapport with diverse donors.
- Strong emotional intelligence and ability to navigate sensitive conversations.
- Strategic thinking and problem-solving skills.
- Self-motivation and ability to work independently while contributing to team goals.
- Attention to detail and ability to manage multiple donor relationships simultaneously.
- Commitment to confidentiality and the highest standards of donor service.
- Adaptability and comfort working in a dynamic, mission-driven environment

Preferred Qualifications

- Advanced degree or professional certification in a related field (e.g., CFRE, CFRM, CAP, 2164).
- Experience working in a community foundation or similar grantmaking organization.
- Knowledge of the local community and established relationships with key stakeholders.
- Background in financial or estate planning, with the ability to discuss complex giving strategies.
- Proven track record of success in donor retention and growth of giving levels.
- Experience in developing and implementing donor stewardship plans.
- Demonstrated ability to translate complex philanthropic concepts into easily understandable terms for donors.
- Strong presentation skills with experience in public speaking and donor education.

General Physical Requirements

- Sedentary work: exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently to move, transport, position, install or remove objects weighing up to 10 pounds across office or various outdoor locations.
- Sedentary work involves remaining in a stationary position most of the time. Occasional moving about and maneuvering objects. Occasionally moves items weighing up to 10 pounds, exerting over 10 pounds of force. Recurrent repetitive motion (such as typing) is involved in performing this role.

Working Conditions

- This is a hybrid position with work performed at a combination of the Foundation's two office locations (Venice and Sarasota) as well as remote work determined by operational need.
- The employee is not substantially exposed to adverse environmental conditions.
- Events may take place off-site and may necessitate exposure to weather elements.
- Ability to work from multiple locations as needed.

Disclaimer

The employee must be able to perform the essential functions of the position satisfactorily and, if requested, reasonable accommodations will be made to enable employees with disabilities to perform the essential functions of their job, absent undue hardship for the employer.

Acknowledgement

I have carefully read and understand the contents of this job description. I understand the responsibilities, requirements and duties expected of me. I understand that this is not necessarily an exhaustive list of responsibilities, skills, duties, requirements, efforts or working conditions associated with the job. While this list is intended to be an accurate reflection of the current job, the Employer reserves the right to revise the functions and duties of the job or to request that additional or different tasks be performed as directed by the Employer. I understand that the responsibilities of this position may occasionally require extended hours beyond the standard 40-hour workweek, as well as flexibility in scheduling that could include different shifts or work outside typical business hours. I also understand that this job description does not constitute a contract of employment nor alter my status as an at-will employee. I have the right to terminate my employment at any time and for any reason, and the Employer has a similar right.

Employee Name: _____

Signature: _____ Date: _____

I have reviewed the job description with the employee.

Supervisor Name: _____

Signature: _____ Date: _____