



Position Title: Philanthropic Director, Central Region
Position Type: Exempt
Location: Chicago, IL or other Central US location
Date: 02/27/20

About Foundation Source

Foundation Source is America's leading provider of comprehensive outsourced support services for private foundations, including administration, compliance and philanthropic advisory services. The company's full suite of back-office, online, and advisory services help its foundation clients ease their administrative burdens and achieve greater social impact.

Foundation Source's client base of high net worth individuals and families has grown significantly since the inception of the company in 2000. Today, the company serves more than 1,600 private foundations nationally representing \$16 billion in assets under administration. In the past year, we processed almost 38,000 grants on behalf of our clients, representing more than \$726 million in charitable assistance. Since inception, Foundation Source has distributed more than 304,000 grants for our clients, totaling over \$5 billion. Foundation Source is headquartered in Fairfield, CT with a national presence through regional hubs in Boston, New York, Philadelphia, Chicago, Florida, Los Angeles, San Francisco, Seattle, and Texas.

Position Description

The Philanthropic Director, (PD Central Region), will be based in the Central USA region as a philanthropic expert and consultant who serves clients who reside in the Central U.S., from Minnesota to Texas. The PD will allocate the majority of their time to directly supporting Foundation Source's foundation clients. This support includes travel for periodic visits, facilitating family or board meetings, assisting with the foundation's mission or strategy, or connecting clients to resources in their areas of interest. The remainder of the PD's time is dedicated to supporting the business development needs of the in-region Sales Team with strategic partners and new prospects and engaging in brand enhancing activities.

Essential Duties and Responsibilities

The PD serves three critical business needs:

- PDs cultivate and deepen the company's relationship with its clients in order to increase client satisfaction and retention. The PD serves as a local contact and resource on philanthropic matters to clients, supplementing and enhancing the services provided by our Fairfield, CT-based client services team. Through meetings in person and on the phone, or through consulting projects, the PD applies philanthropic expertise to help foundation clients with mission and programmatic direction, succession planning, next generation involvement, board meeting facilitation, governance, and strategic grantmaking.
- PDs provide business development support to the company's in-region members of the Sales Team. Discussions with prospective clients require philanthropic expertise and experience. The PD contributes consultative sales assistance and other philanthropic support to advisors and their philanthropic clients.

- PDs are thought leaders. Their expertise in private foundations and stature in the philanthropic sector contributes to Foundation Source’s reputation among our centers of influence. PDs participate in market development activities that may include giving speeches, attending conferences, hosting events, and developing resources to increase the company’s visibility among advisors, attorneys, HNW individuals, and private foundations. The PD will be expected to develop content in support of our clients and prospects philanthropic interests; design and conduct webinars; and develop case studies/client success stories based on client interactions and engagements.

Professional Qualifications

The Philanthropic Director should have strong skills in philanthropic strategy and program design, and expertise in foundation administration, compliance, and grantmaking issues. Sales experience is not a requirement; however, the Philanthropic Director will be expected to intelligently articulate Foundation Source’s range of services and value proposition. The successful candidate should have the relevant background and experience to grow Foundation Source’s philanthropic advisory services in the Central region.

- Resides in the Central USA region with strong local personal and professional networks.
- Direct programmatic/grantmaking experience at a large private foundation as a program director, senior program officer, or evaluation manager, or with a small to mid-size foundation that has engaged in creative, effective philanthropy.
- Demonstrated knowledge of foundation strategy, grantmaking, compliance, and administration.
- Demonstrated experience advising or consulting high-net-worth clientele.
- Top-notch writing and presentation skills. Superior ability to communicate clearly and effectively in both written and verbal formats.
- Demonstrated ability to contribute to the development of consulting materials for the department.
- Proven ability to speak in front of groups, facilitate meetings, and develop in-depth articles and reports.
- Experience leading or managing corporate philanthropy is preferred.
- Undergraduate degree is required; an advanced degree in a related field is preferred.

Personal attributes

- Strong client-service orientation and interpersonal skills, a “can-do” attitude and strong sense of diplomacy and ethics are absolutely critical.
- Image, poise and professional presence; capable of establishing credibility quickly with donors and clients as a thoughtful and knowledgeable advisor; high confidence and low ego; open to feedback and the opinions and ideas of others.
- Demonstrated ability to take initiative, manage multiple tasks and adhere to deadlines, achieve high productivity, and work independently and in teams.

Travel/Home Office:

- This role will require the employee to work remotely from their own home.
- The ability to travel frequently to see clients and represent Foundation Source at conferences and other events is essential to this position.

Compensation:

Foundation Source offers a competitive compensation and benefits plan that is commensurate with experience.

How to Apply

Interested applicants should send a cover letter and resume by email to careers@foundationsource.com. Please indicate the position "Philanthropic Director" or "PD" in the subject line of the email. No phone calls, please.

Physical Demands and Work Environment:

- In order to perform successfully the essential functions of this position, an employee must generally be able to do the following: communicate verbally (speak and hear); use hands or fingers; handle or feel objects, tools, or controls; stand; walk; sit; reach with hands and arms; occasionally lift and/or move up to 15 pounds; drive and write coherently and grammatically in English. The position requires the ability to see objects, print, and/or images at close range and in the distance, and the ability to adjust focus. The noise level in the work environment is usually low to moderate. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of the position.

NOTE:

- This job description does not include all of the duties that may be required of an employee in this position. Other functions, tasks, and duties may be assigned by the Company, in its discretion. To perform this job successfully, an employee must possess the skills, aptitudes, and abilities to perform each duty proficiently. Educational and experience requirements listed in this document are the minimal requirements for consideration for the position. The set of functions considered "essential" is subject to modification by the Company. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of this position. This job description does not create an express or implied employment agreement; in the absence of a specific written agreement to the contrary, all Foundation Source employees are employed "at will," and may resign or be discharged at any time, with or without notice.

Foundation Source is an Equal Opportunity Employer, maintains a drug free workplace, and complies with the ADA.

All applicants are considered without regard to race, color, religion, sex, gender identity, sexual orientation, pregnancy, age, national origin, ancestry, physical/mental disability, military/veteran status, genetic information, marital status, or any other protected characteristic under applicable federal, state, and local laws. By completing this application, you are seeking to join a team of hardworking professionals dedicated to consistently delivering outstanding service to our customers and contributing to the financial success of the organization, its clients, and its employees. Any applicant requiring a reasonable accommodation to complete the application and/or participate in the interview process should contact a management representative.