



Position Title: Philanthropic Director, Philanthropic Advisory Services
Position Type: Salaried, Exempt
Location: Remote with Travel
Date: August 2021

About Foundation Source

Foundation Source is the nation's largest provider of management solutions for private foundations. We empower people and companies to create a better world with their philanthropy through a configurable suite of administrative, compliance, and advisory services complemented by purpose-built foundation management technology and private foundation experts.

We work in concert with financial advisors, legal and accounting professionals, consultants, and family offices, as well as directly with individuals, families, and corporations to bring philanthropic visions to life. As we celebrate our 20th year of service, Foundation Source supports nearly 2,000 family, corporate, and professionally staffed foundations of all sizes and has enabled more than \$7 billion in charitable grants.

Position Description

As a member of the Philanthropic Advisory Services (PAS) team, the Philanthropic Director (PD) is a Subject Matter Expert (SME) on grantmaking, foundation leadership, the philanthropic and nonprofit sectors, and board and family dynamics.

The PD will advise a range of Foundation Source Clients that vary in asset size, program interest, level of involvement, grantmaking approaches and advisory needs. The goal of providing advisory support is to enhance, strengthen and improve the philanthropic giving experience of Foundation Source Clients with expertise derived from years of hands-on experience in the sector.

The PD will partner with those clients to:

- set up foundation boards
- develop board policies and schedules
- advise on the creation of foundation strategies (e.g., program development, board transition, communications, etc.)
- advise on programmatic priorities and grantmaking practices
- provide practical information on the nonprofit sector
- assist foundation leadership with key transitions (e.g., board membership, integration of new generations of family members, etc.)

Members of the PAS team focus first and foremost on advising current Foundation Source Clients. They will also participate in business development and will be key partners in a variety of internal activities:

- aligning Foundation Source guidance with other Professional Services Teams (Legal Services, Accounting, etc.)
- developing proposals for service
- identifying topics for Foundation Source Marketing Collateral
- mentoring colleagues across the firm
- making presentations to the nonprofit, financial and other adjacent sectors

The PD reports to the National Director of Philanthropic Advisory Services and will be part of a team of philanthropic directors. The role requires a combination of independence, initiative, humility and knowing when to ask for help, and a strong work ethic and team mindset.

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 contact and resource on philanthropic matters to clients, supplementing and enhancing the services provided by our Fairfield, CT-based Client Services Team. 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 via email, phone, videoconference and in-person meetings
- PDs partner with the Sales Team in business development activities, such as discussions with prospective clients that 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 contribute 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 must 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.

We are seeking candidates who have the following experience:

- Direct programmatic/grantmaking experience at a large private foundation as a program officer or a program/executive director at a small to mid-size foundation (required).
- Direct management of a grantmaking portfolio of substantial size and scope (strongly preferred).
- Demonstrated knowledge of foundation strategy, grantmaking, compliance, and administration.
- Demonstrated experience advising or consulting HNW clientele (preferred).
- Top-notch writing and presentation skills.
- Superior ability to communicate clearly and effectively in both written and verbal formats and create presentations.
- Demonstrated ability to contribute to the preparation of business development and consulting materials for the department and firm.
- Proven ability to speak in front of groups, facilitate meetings, and develop in-depth articles and reports.
- Knowledge of corporate philanthropy (preferred).
- Undergraduate degree (required); an advanced degree in a related field (preferred).
- Strong professional networks in the philanthropic and nonprofit sectors.

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 prospects and clients as a thoughtful and knowledgeable advisor; high confidence and low ego; open to feedback and the opinions and ideas of others.
- Strategic approach that enables one to see the big picture and devise innovative solutions to Client/Prospect questions and needs, while being consistent with firm objectives.
- Demonstrated ability to take initiative, manage multiple tasks and adhere to deadlines, achieve high productivity, and work independently as well as with 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. (However, due to precautions related to COVID-19 we are not currently requiring employees to travel.)



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

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

Note:

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.