

Title: **Director of Philanthropic Services**

Reports to: Vice President for Philanthropy

Supervises:

FLSA Classification: Exempt

Prepared Date: December 2023

**POSITION DESCRIPTION:** The Director of Philanthropic Services is a full time, cross-functional position that works closely with the CEO, VP for Philanthropy and VP for Grants and Program to advance the community foundation's donor services, fund development, asset expansion, and grantmaking outcomes. Part of a collaborative team, this position is externally focused on building productive relationships with current and new donors that lead to increased philanthropic activity and Foundation capacity to benefit our region.

This position is the lead coordinator in the Foundation's efforts to develop and maintain all-important personal relationships with our fundholders and donors. It makes sure all staff are involved in donor services, involves Board members to the greatest degree possible, and ensures that donors are served well. This is a pivotal position in executing our relationship management program that deepens the connection of mid-tier, "critical core" donors with the Foundation's work so that they become active, committed fundholders and legacy donors over time.

**ADIRONDACK FOUNDATION CONTEXT:** Adirondack Foundation is a regionally renowned nonprofit that works in a high-energy office dedicated to building stronger communities and a better quality of life for all residents in the Adirondack region. We are a hub for generosity, working with donors from all walks of life to give to the people, places, and things they love--now and later through legacy planning.

The Foundation manages a growing collection of charitable funds created by individuals, families and businesses, with a priority of building unrestricted discretionary funds for high-impact grantmaking. Each year, the Foundation distributes over \$6 million through grants and scholarships, helping thousands of donors achieve their philanthropic goals and hundreds of nonprofits carry out their good work. Adirondack Foundation is a 501(c)(3) nonprofit public charity, managed by an experienced, skilled staff, it has \$88 million under management, 300 funds and a staff of 12.

The Foundation is an ambitious organization that works with community and nonprofit leaders, always growing its understanding of ever-changing needs and embracing a culture of high performance, transparency and flexibility. Working respectfully and cooperatively as a team, our staff is inspired by the Board of Trustees and Community Council that guide our work, as well as the donors and nonprofits partners we work to support.

**Job Overview:**

The Director of Philanthropic Services is critical to growth of the Foundation, collaborating with both the Grants and Program and Development Teams to meet annual fundraising goals including new funds and gifts to existing Funds. The coordination and management of this position will deepen current fundholder investment and generate community interest in creating funds at the foundation,

helping the region by expanding the Foundation's assets and driving donor support to the Foundation's priority areas. This position will ensure that our donors are well cultivated, stewarded and engaged with the needs of the Foundation and the community.

### **PRIMARY DUTIES AND EXPECTATIONS**

- Make face to face gift solicitations with the CEO, VP for Philanthropy, Board Members, and other volunteers to help donors create new funds, establish legacy gifts, or add to pre-existing funds. Provide fundholder service & follow up.
- Coordinate the creation of new Funds, leading conversations about donors' philanthropic priorities and working with Program and Finance teams to streamline and execute the fund setup process. Lead interactions to welcome new fundholders.
- Manage a Fundholder engagement plan, coordinating staff to perform Fundholder check-ins and philanthropic advising. Deepen personal relationships with fundholders and understand their philanthropic priorities.
- Assist Funds and Program Officer in executing annual Co-giving program, asking fundholders to join the Foundation in supporting Generous Acts grant applicants.
- Give presentations to local organizations and professional advisors to broaden local understanding of the Foundation and expand use of the Foundation's services by donors as they pursue tax strategies, expand their family philanthropy, and develop legacy plans.
- Work with the VP for Philanthropy to integrate a strong planned giving element with all our donor and prospective donor interactions. Manage Legacy Family recognition and build Legacy giving by leading donors and their financial advisors in discussions about how planned giving can help them realize their charitable goals. Lead annual promotion of Legacy giving through events and/or mailings.
- Provide the highest possible quality of service and information, responding to donor requests for information about grantees, fund balances, fund administration and policies governing funds at Adirondack Foundation.

### **Other Duties**

- Maximize usage of our CSuite platform and Fund Advisor portal to track donor information and provide stellar service to fundholders
- Work with the Director of Communications on messaging and other publications that promote Fund building and Legacy planning
- Participate in professional development programs about the community foundation field
- Assist with orchestrating donor gatherings, and attend and follow up as needed
- Keep abreast of significant legislative and regulatory changes that affect charitable giving and usage of donor advised funds

### **General Administration**

- Assist in welcoming donors, grantees, potential donors and grantees, and the public at the Adirondack Foundation office.
- As needed, join staff in assisting with office operations and organization.
- Attend meetings of the Board, the Development Committee and other groups, as needed.
- Work to help implement the Development components of the strategic and annual work plans for the organization.

- Have an approach that yields pride, ownership, open communication, camaraderie and respect among staff.
- Ski, walk, run at Heaven Hill Farm.

### **Experience, Skills, and Education**

- Bachelor's Degree or its equivalent experience
- Philanthropy, donor services, or customer service experience preferred
- Experience in a nonprofit organization a plus
- Background with problem solving and project management
- Strong writing skills and verbal communication, organizational and planning capacity
- Acumen with computers, experience with Google platforms and the Microsoft Office Suite, as well as capacity to work in our Community Suite and Donor Search platforms.

### **Personal Qualities**

- High energy team player who melds well into a highly collaborative team
- Passionate about the Adirondacks, our neighbors, and their communities
- Extremely organized and attentive to detail, able to multitask and manage many priorities
- Self motivated professional with a track record of building individual and corporate relationships
- Compassionate about other people and goes the extra step to make everyone feel special including donors, grantees, colleagues
- Undaunted by asking someone for support or starting conversations at a function
- Exhibiting sound judgment, discretion and high ethical standards
- Possessing vision, creativity and sense of humor

Salary based on experience, but the range is \$65,000-\$73,000, plus full benefits. To inquire with questions or apply with cover letter and resume, contact [info@Adkfoundation.org](mailto:info@Adkfoundation.org) or call 518-523-9904.