



Position Description

Title: Philanthropic Advisor	Hours: Full-Time
Department: Philanthropic Services	Classification: Exempt
Reports to: Sr. VP, Advancement	Created On: January 2018

Position Overview:

A Philanthropic Advisor’s role is to advance the short- and long-term asset development and donor relationship goals of The Minneapolis Foundation. The Philanthropic Advisor serves as a member of the Foundation’s professional philanthropic staff to lead projects and programs, conduct programmatic and strategic planning work for Foundation donors, and advance The Minneapolis Foundation’s philanthropic promotion and business development efforts.

The Philanthropic Advisor is responsible for a donor portfolio, assisting donors in achieving their charitable goals. The Philanthropic Advisor works closely with financial and other professional advisors to customize charitable solutions for their clients, leveraging our experience in philanthropy and financial management to help these advisors realize their clients’ visions.

The Philanthropic Advisor works collaboratively as a member of the Foundation’s Philanthropic Services team to support specific client engagements. This work includes designing, developing and evaluating philanthropic programs, supporting client relationships, and researching philanthropic issues.

The Philanthropic Services team actively collaborates to reach goals based on their four key values:

- Connecting – We strive to connect our donors to resources that support their giving.
- Sharing – We aim to give our donors opportunities to share their knowledge and learn from each other.
- Advising – We offer our donors advice about charitable giving that meets their specific interests.
- Relating – We show our donors that we understand their needs and the needs of our community.

Principal Duties and Responsibilities:

75%	<ul style="list-style-type: none"> • Achieve performance metrics for growth of direct sales to donors through cultivation of existing foundation relationships and cultivation of prospective donors. • Cultivate and grow relationships with professional advisors, community organizations and other institutions and associations to position the Foundation as the premier community-based center for philanthropy. • Maintain portfolio management responsibilities for donor advised and other funds as assigned to assist donors in the furthering of their charitable goals, generating additional contributions to funds and referrals to other prospective donors. • Provide guidance in planned giving, community grant making and family philanthropy to all donor and prospect relationships as needed. • Meet or exceed all assigned performance metrics by month, quarter and year.
20%	<ul style="list-style-type: none"> • Document cultivation interactions in the iPhi database. • Maintain a portfolio of 100-150 individuals and/or family foundations.
5%	<p>In collaboration with other colleagues:</p> <ul style="list-style-type: none"> • Participate in cross-departmental work teams including, but not limited to Marketing/Communications, Community Impact and Finance. • Establish annual goals and objectives that align with those of the Philanthropic Services department. • Perform other duties as assigned.

Qualifications for Success:

- Bachelor's degree plus three to five years of experience in development, fundraising or a related field. Success in planning marketing and engagement strategies and tactics to develop and/or grow new market segments.
- Experience working with a high-net-worth clientele, establishing "trusted advisor" relationships as well as prospect and referral networks.
- Strong customer service and organizational skills with the ability to handle sensitive and confidential information appropriately.
- Ability to work successfully with diverse individuals with a variety of work and communication styles, both internally and externally.
- Effective and persuasive verbal and written communication style. Ability to develop and maintain positive interpersonal relationships.
- Ability to think strategically.
- Business technology skills, including the ability to operate business machines and adeptness with a number of computer software applications, including MS Office products. Experience with moves management or constituent database systems a plus.
- Responsiveness and ability to prioritize and work accurately to meet deadlines in a fast-paced environment and adjust to changing and/or tight deadlines.
- Demonstrated initiative.
- Creative problem-solving skills.

Preferred Qualifications:

- An understanding and network of existing or emerging philanthropists.

Working Conditions

- Frequent meetings and travel in and around Minneapolis and greater Minnesota.
- Occasional attendance at evening and weekend events.
- General office setting with work at personal computer for extended periods of time.