



## NEW HAMPSHIRE CHARITABLE FOUNDATION

### Senior Philanthropy Advisor

Date of Last Revision: 08/27/2019

**Title Group:** Advisor

- increases charitable giving to and through the Foundation
- has no responsibilities for performance management of staff

**Department:** Philanthropy

**Reports To:** VP, Development & Philanthropy Services

**Status:** Full-time | Exempt

#### Position Summary

**Primarily Advances Strategic Goal:** Greater Giving Through the Foundation

Responsible for increasing charitable giving to and through the Foundation by developing and maintaining strong and effective trusted relationships with high capacity donors, prospects, and professional advisors. Facilitates and fosters donor, prospect, and professional advisor connections to other staff and the larger organization to increase engagement and build long-term partnerships. Senior Philanthropy Advisors are typically assigned primary responsibility for developing and stewarding relationships in one or more regions of the state. This position would be focused on the Piscataqua Region.

#### Essential Job Functions and Responsibilities

##### *Donor Development and Stewardship*

- Performs intentional, relationship-based activities focused on Charter/Specialized/Premier (C/S/P) donors, prospects, and professional advisors, in partnership with other staff as appropriate
- Serves as primary relationship manager for a portfolio of donors, prospects and professional advisors; consults with donors and prospects to provide donor-focused philanthropy advice
- Provides concise, cost-effective Foundation, philanthropy and gift planning information to a broad network of donors, prospects, and professional advisors
- Maintains a working knowledge of issues and initiatives within the assigned region(s) and familiarity with local nonprofit networks
- Partners with Foundation staff to provide high quality, effective services to donors consistent with the assigned service level; facilitates current and planned gifts
- Develops and maintains relationships with legal, financial and wealth advisors serving a high net worth clientele to provide gift planning support and facilitate referrals to the Foundation
- Plans relationship building events for prospects, donors, fund establishers, and professional advisors in coordination with the Communications department and others as appropriate

- Attends community events for the purpose of building/strengthening relationships with C/S/P donors, prospects, and professional advisors
- Documents relevant information and records visits within 48 business hours of the activity

#### *Liaison to Regional Advisory Board*

- Plans and organizes advisory board meetings in partnership with the Advisory Board Chair
- Leads advisory board member recruitment
- Orients new advisory board members to the Foundation and their role
- Engages advisory board members in outreach to prospective donors and professional advisors to build assets within the Foundation

#### *Other*

- Performs other duties as assigned

### **Essential Knowledge, Skills, and Attributes**

- Working knowledge of gift planning strategies to include bequests, charitable gift annuities, charitable remainder trusts and charitable lead trusts
- Excellent relationship management skills and ability to engender trust
- Ability to handle sensitive and confidential information with discretion and judgment
- Ability to be self-directed, as well as succeed and thrive in a collaborative team environment
- Ability to lead, inspire and motivate others and assume a leadership role on a team when appropriate
- Effective written and verbal communication skills, including active listening
- Effective public speaking and group presentation skills
- High sense of accountability for achieving results
- Ability to delegate tasks or projects when appropriate
- Understanding of community foundation and Philanthropy processes; nonprofit management or board experience useful
- Ability to work comfortably in a fast-paced environment
- Ability to organize multiple tasks/projects, as well as prioritize tasks within projects
- Belief in the mission and purpose of the New Hampshire Charitable Foundation

### **Job Characteristics**

- Shared office environment based in Concord, Portsmouth, or Hanover, NH, or a home office as a base, depending on assigned region(s)
- Night and/or weekend work may be required
- Travel throughout assigned region(s) and around the state required on a regular basis; may require travel to conferences with overnight travel possible

### **Essential Qualifications**

- A combination of education, certifications and/or relevant work experience equivalent to the needs of the role.
- Extensive knowledge of and experience in donor relations with high net worth individuals and professional advisors; proven track record in asset development
- Strong computer skills, including email, word processing, spreadsheets, Internet, and databases
- Valid driver's license

## Organizational Life

- Participates in the Foundation's organizational life, including department management, improvement teams, and events as required
- Positively demonstrates the values and contributes to the culture of the Foundation
- Demonstrates a commitment to community and the well-being of New Hampshire
- Interacts professionally with other employees and external stakeholders
- Works effectively as a team contributor on all assignments
- Follows all company policies and procedures, as well as all local, state and federal laws concerning employment
- Contributes to a safe and productive environment

*Essential job functions and requirements are subject to possible modification to reasonably accommodate individuals with disabilities.*

*This job description is intended to convey information essential to understanding the scope of the job and the general nature and level of work performed by job holders within this job. However, this job description is not intended to be an exhaustive list of qualifications, skills, efforts, duties, responsibilities or working conditions associated with the position. This job description is general and may evolve over time. The description is subject to periodic updating. At management's discretion, the employee may be assigned different and/or additional duties or responsibilities.*