



Philanthropic Director, Central Region
Position Description

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 2001. Today, the company serves more than 1,400 private foundations nationally representing \$13.5 billion in assets under administration. Foundation Source is headquartered in Fairfield, CT with a regional presence in Boston, New York, Philadelphia, Chicago, Florida, Los Angeles, San Francisco, and Texas.

Essential Duties and Functions

The Philanthropic Director (PD), Central Region, is a philanthropic expert and consultant who serves clients who reside in the central U.S., from Minnesota to Texas. 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 role provided by our Fairfield, CT-based client services team. Through meetings in person and on the phone, or through short-term consulting projects, the PD applies philanthropic expertise to help foundation clients with mission and strategy, governance, succession planning, next generation involvement, facilitating board meetings, etc.
- PDs provide business development support to the company's in-region Managing Directors, the sales force for the company. Discussions with prospective clients often require a certain degree of philanthropic expertise and experience. The PD contributes consultative sales assistance and other philanthropic support to advisors and their philanthropic clients.
- PDs elevate brand awareness of Foundation Source and enhance the company's credibility as private foundation specialists by participating in market development activities that may include speeches, attendance at 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 enhance the company's reputation for philanthropic expertise by developing content in support of our clients and prospects philanthropic interests; designing and conducting webinars; and developing case studies/client success stories based on client interactions and engagements.



The PD, Central Region, will be based in the Central USA region and report to the Chief Philanthropic Officer. The PD will allocate the majority of his/her 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 in-region Managing Directors with strategic partners and new prospects and engaging in brand enhancing activities.

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.

Professional Qualifications

- Resides in the Central USA region with strong local personal and professional networks.
- Direct philanthropic experience, preferably in a large, national 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 interacting with a 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.
- 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.

Physical Demands and Work Environment

- This role will require the employee to work remotely from their own home.
- The ability to travel to see clients as needed 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 September 1, 2018** by email to careers@foundationsource.com. Please indicate the position “philanthropic director” in the subject line of the email. No phone calls, please.

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.