



Job Title: Philanthropy Advisor

Job Status: Full Time, Exempt

Status Requirements: None/Not Applicable

Access to Patient/Family Information: Access to patient/family information, limited to need-to-know only related to information that directly pertains to donor relations.

Access to Employee Health Information: Access to personal health information only.

Organizational Relationship: Board of Directors (BOD) → Chief Executive Officer (CEO)
→ Senior Director, Clinical Services and Mission Engagement → Philanthropy Advisor

Branch: Clinical Services and Mission Engagement

Division(s): Mission Engagement

Department(s): Philanthropy

Position Summary

The Philanthropy Advisor is a critical role on the CareFirstNY team which guides and coordinates all philanthropic efforts for the organization. This role's primary function is to deepen relationships with current donors and actively facilitate relationship building with new donors. The Philanthropy Advisor, in collaboration with their Department Director, will plan and execute all approved fund development endeavors including fundraising events, donor development, and grant pursuits.

Essential Duties and Responsibilities

- Provide recommendations and guide the organizations philanthropic efforts
- Plan and execute all fundraisers for the organization including but not limited to fundraising events, sales, donor requests, and all new initiatives
- Initiate and guide a new strategy for year-round donor engagement

- Identify new and existing donors with greater philanthropic potential, intentionally engage and grow those relationships, and measure success of donor development efforts over time
- Create an annual grant strategy that aligns with organizations goals and strategic priorities in collaboration with Department Director and Senior Leadership Team
- Identify and pursue local, state, and federal grant opportunities that align with current grant priorities in coordination with appropriate internal stakeholders
- Coordinate with the CareFirstNY leadership team and other appropriate stakeholders to assure appropriate utilization of all grant funding and complete all follow-up grant reports as required by the grantors
- Collaborate with primary stakeholders on fundraising and revenue targets, establishing performance metrics to measure success of fundraising efforts
- Participate in regular reviews of performance metrics of fund development efforts to enhance performance of future initiatives
- Report initiative results to appropriate internal stakeholders for financial and strategic reporting
- Assist with budget development and continually reforecast expenditures based on attainment of identified performance indicators
- Co-develop with the Mission Engagement Advisor and Department Director strategies for effective production and implementation of marketing and advertising efforts that enhances engagement and exposure of CareFirstNY mission and services

Additional Duties

- Demonstrate compassionate behavior
- Exceptional communication and computer skills
- Proficiency in proposal creation and presentation
- Ability to execute initiatives in fiscally responsible manner
- Able to plan activities and carry them through effectively
- Positive attitude about working with families of diverse cultural and religious backgrounds
- Works confidently within a group

Qualifications

Qualified candidates will possess a minimum of 2 years' experience in fundraising, development, donor relationships, and/or related field. Bachelor's Degree highly preferred. Must have strong communication, computer, time management, and relationship management skills.

Confidentiality Agreement

I shall respect the privacy concerns of the people we serve, and I shall hold in confidence all information obtained in the course of professional service, whether that information is obtained through written records or daily interaction with the person. I shall store or dispose of professional records in ways that maintain confidentiality. I shall possess a professional attitude which upholds confidentiality towards the people we serve, colleagues, applicants and any sensitive situations arising within the agency. I, upon termination, shall maintain client and co-worker confidentiality and I shall hold confidential any information about sensitive situations within the agency. I understand that violation of this confidentiality statement may be grounds for immediate dismissal.

Staff Please Print

Staff Signature

Date

Supervisor Signature

Date