Senior Development Officer (Professional Advisors)

Department: Development
Reports to: Vice President of Development
Hours and Location: Full time, exempt. Initially working remotely due to COVID-19, but when the office reopens, this position will be based in our downtown Oakland office.
Starting Salary: $110K to $115K
Application Deadline: February 15, 2021
Ideal Start Date: April 2021

About East Bay Community Foundation
Founded in 1928 and supported by over 400 local donors, the East Bay Community Foundation partners with fundholders, social movements, and the community to eliminate structural barriers, advance racial equity, and transform political, social, and economic outcomes for all who call the East Bay home. The Foundation is committed to advancing a Just East Bay, where all members of our community are treated fairly; resulting in equitable opportunity and outcomes for all. Today, EBCF manages over $800 million in community-based assets and offers charitable tools, funds, and investment options to enable donors to give smartly. For more information, visit ebcf.org

Goals for the Development Team
- Organize a minimum of $5M to move in alignment with A Just East Bay framework each year
- Raise ~$30M of new money each year
- Recruit new donors that are excited about or open to EBCF’s mission and vision
- Through donor organizing strategies, engage at least 20 new donors to invest in EBCF’s A Just East Bay vision

Position Summary
EBCF is implementing exciting strategies to move our 400+ donors to align their giving with a deeper analysis and reflection about the structural root causes of the persistent and growing inequities in our region. The Senior Development Officer therefore will be responsible for: (1) successfully stewarding and aligning a portfolio of donors with EBCF’s mission of advancing A Just East Bay; (2) raising substantial new resources towards EBCF’s mission; and (3) helping educate and organize donors to become philanthropic and civic leaders for A Just East Bay. This position will take a professional with a unique set of skills and social justice analysis. It combines donor stewardship, individual fundraising, social justice education and donor organizing. While experience at a philanthropic institution may help in this position, it is not required. We are seeking skilled professionals who meet our core requirements around moving and organizing donors. We are seeking professionals excited about EBCF’s mission, its new way of engaging donors, and with the passion and experience to make it real.
Essential Responsibilities:

- Manage a portfolio of professional advisor relationships; participate in frequent meetings with advisors, keeping them informed on charitable vehicles offered by EBCF.
- Engage professional advisors on EBCF’s vision for A Just East Bay, which includes priorities identified by EBCF’s community partners to create a more equitable and just region. Engage advisors on their own learning around the structural barriers to opportunity in our region.
- Lead the planning and execution of professional advisor engagement events and activities.
- Partner with colleagues across the department to develop compelling professional advisor outreach materials.
- Provide support, tools, and guidance to advisors to assist them in integrating charitable giving into their financial planning and wealth management conversations with their clients.
- Attend, participate and when appropriate, present at industry conferences. Attend events to increase visibility of EBCF.
- Support the philanthropy and philanthropic leadership of a portfolio of current donors, helping to ground them in social justice values.
- Cultivate new donors, with a particular focus on key areas of growth as identified by the Foundation.
- Engage a portfolio (50-75) of current donors in becoming effective, powerful leaders for A Just East Bay.

Core Qualifications and Required Skills:

- **Passion for the mission of EBCF to advance A Just East Bay.**
- **At least 5+ years of philanthropic advising/wealth or investment advising/estate planning, and or fundraising experience (paid or unpaid experience).** Demonstrated success in developing and maintaining donor or client relationships.
- **Relationship building skills** with a wide range of people. Skilled and excited to build trust with people, listen, ask questions, responsive to feedback, and build authentic relationships around the issues they care about, and activating those interests towards social justice.
- **Demonstrated commitment to racial, economic, and social justice and equity.**
- **A basic fluency in and comfort talking about oppressions** such as racism, sexism, and classism and an understanding of how their own experiences and background relate.
- **Results-oriented:** Someone who gets it done, determined, creative, and solutions-oriented.
- **Strong project management:** A strong track record of creating work plans, setting goals, measurable targets, balancing multiple tasks and projects, and meeting deadlines; strong administrative acumen and an excellent attention to detail. Comfort with effectively communicating about progress.
- **Team-player:** Have a ‘low ego, high output’ mindset. Highly collaborative, flexible, and open to shifting priorities and timelines and an ability to identify new, creative solutions when challenges arise. Excited to build a stronger organization that operationalizes its new mission, vision, and values, internally and externally.
- **Creativity & willingness to learn:** Excitement for and experience developing and executing new business strategies, testing bold approaches towards philanthropy, donor experiences and learning, while appreciating, learning from, and building on EBCF’s rich history and tried and true models. Solicits and
welcomes contributions from staff at all levels in the organization towards successfully building relationships with our donors.

- Excellent persuasive communication skills (written, visual, oral) with individuals.

The Ideal Candidate will have:

- Knowledge of estate planning, investment, or financial services sectors.
- Knowledge of and relationships in the East Bay, particularly around philanthropy and its social justice landscape.
- Experience working with individuals and families on their financial assets, and/or their philanthropy, and how they can align their financial decisions with social justice values.
- Belief in the importance of organizing donors to become powerful participants and allies in local social justice movements; an ability and interest to engage in potentially challenging conversations around class and race with people with wealth.
- Experience stewarding donors with Donor Advised Funds (DAFs), or experience working at a DAF provider (e.g. a community foundation or other philanthropic advising institution).

Compensation

The starting salary range for this position is $110,000 - $115,000; compensation is commensurate with experience and background. EBCF offers an excellent benefits package.

How to Apply

To apply, please email a combined PDF or Microsoft Word File of a cover letter and resume to jobs@eastbaycf.org by 5:00pm, PST on Monday, February 15th. Please use the complete subject line: EBCF Senior Development Officer (Professional Advisors).

The East Bay Community Foundation (EBCF) is an equal-opportunity employer with a commitment to racial justice and racial equity. EBCF does not discriminate in employment opportunities or practices on the basis of race, ethnicity, religion, national origin, age, sex, sexual orientation, marital status, disability, or any other characteristic protected by law and is an employment-at-will organization. The Foundation welcomes and encourages people of color, women, LGBTQIA+ people, and members of other historically disenfranchised groups to apply.