



Catholic Community  
**FOUNDATION**  
OF MINNESOTA

Position Profile

# Philanthropic Advisor

Full time (approximately 40 hours/week)



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## Fast Facts

### Location

Saint Paul

### Service Area

State of Minnesota with primary focus on the Twin Cities metro area

### Staff

19 staff members

### For the year ending JUN. 30, 2021:

\$510 million in assets

\$17.3 million in grants distributed

1,114 total funds

\$207 million granted since inception

### Board of Directors

The Catholic Community Foundation is guided by a board of directors drawn from the ranks of Fortune 500 companies, major financial institutions, Catholic universities and the Federal Reserve. The Board comprises 25 members.

For more information, please visit

<https://www.ccf-mn.org/>

## Mission

### Mission

Our mission is to support financially the spiritual, educational, and social needs of our Catholic community.

### We fulfill this mission by:

- Helping donors achieve their charitable and financial goals.
- Helping Catholic parishes, schools and organizations meet their long-term financial needs.
- Performing sophisticated financial transactions to raise funds for charitable purposes.
- Distributing earnings according to donor intent and community priorities.
- Seeking endowment funds to sustain our mission.

“We are not Catholic Charities. We don’t house and feed people. We provide funding in perpetuity for those who do.”

**- Anne Cullen Miller, President**

# CCF at a Glance



## The Organization

A community foundation is a public charity established to serve specific charitable interests for a designated purpose or in a designated geographical region. The Catholic Community Foundation of Minnesota (CCF) serves the spiritual, educational, and social needs of Minnesota's Catholic community.

CCF accepts and invests both donor and institutional assets. These assets are invested and then yield grants. CCF's grantmaking includes grants advised by fundholders and their families as well as annual distributions from institutional endowments created to serve organizations in perpetuity. While donor constituents have largely been metro-centric, institutional funds from other dioceses are part of this asset base.

Beneficiaries of grants are nonprofit organizations whose missions serve our communities across a spectrum of nonprofits — both faith-based and secular. CCF screens all grant beneficiaries — regardless of religious affiliation — to verify their tax status; financial management practices, accountability and transparency; and consistency of organizational mission and work with Catholic social teaching.

CCF collects, grows, and distributes funds on behalf of its individual and institutional donors. Their gifts and unrestricted dollars of The Legacy Fund sustain many of the programs that serve our communities. As a community foundation, CCF provides targeted financial support that enables organizations to serve the spiritual, educational, and social needs of the community in perpetuity.

## Investment Philosophy: Efficient, Transparent, & Socially Responsible

1. With \$510 million in assets, CCF manages some of the most sophisticated financial transactions in the charitable realm — while investing in a faith-aligned manner.
2. CCF balances the need to maximize total financial return over the long term, taking into account an appropriate amount of risk, with the need to invest according to our faith.
3. CCF operates professionally and transparently. While past performance is no guarantee of future results, its 990s, audited financial statements, and annual reports demonstrate expertise at achieving that balance.



## Grant Recipients

Over 700 organizations receive grants from Catholic Community Foundation and its donors. Below are just a few of the many grant recipients.

*American Red Cross*

*Banyan Community*

*Catholic Charities*

*Catholic Relief Services*

*Cradle of Hope*

*Cristo Rey Jesuit High School – Twin Cities*

*Guthrie Theater Foundation*

*Jeremiah Program*

*Loaves and Fishes*

*Minneapolis Institute of Arts*

*Minnesota Children’s Museum*

*NET Ministries*

*Relevant Radio*

*Sharing and Caring Hands*

*Saint Paul Chamber Orchestra*

*Saint Paul’s Outreach*

*Saint Paul Seminary*

*Second Harvest Hartland*

*Union Gospel Mission*

*YMCA of the Greater Twin Cities*

*Hundreds of Catholic parishes and schools*

## Primary Objective of This Position

The **Philanthropic Advisor** promotes and represents the work and mission of the Catholic Community Foundation of Minnesota (CCF) to individuals and families in the Archdiocese of Saint Paul and Minneapolis and other dioceses throughout Minnesota.

Reporting to the Vice President of Development and Donor Engagement, the Philanthropic Advisor is responsible for developing partnerships with a portfolio of donors, facilitating giving experiences, and providing strategic guidance to help create suitable philanthropic plans that ultimately support our Catholic community.

## Position Content

### A. MAJOR POSITION RESPONSIBILITIES

- I. Portfolio Management
- II. Project Management

### B. REGULAR ACTIVITIES

#### I. Portfolio Management 90%

- Manage a defined portfolio of new and existing relationships of approximately 150-175. Cultivate and maintain meaningful relationships while providing easy and elevated customer service, increase and make permanent their philanthropic relationship with CCF.
  - New Relationships 50%
  - Stewardship 50%
- Cultivate referrals from portfolio, including to other donor prospects and to professional advisor and center of influence contacts.
- Manage new prospect relationships from first point of contact with CCF through execution on new gifts.
- Conduct discovery meetings, respond to questions and inquiries, research gift possibilities as appropriate, and provide advice and guidance to prospects on the best gift plan for their needs.
- Respond to questions and inquiries raised by prospective and existing donors and “go above and beyond” in levels of service and responsiveness.
- Provide internal technical gift planning support including fund agreement review, drafting fund agreements and board resolutions as needed.

#### II. Project Management 10%

- Build and contribute to team strategies that align with initiative goals designed to drive referrals and build prospect pipeline.
- Serve in project manager role for internal and external projects as appropriate.
- Contribute to a collaborative culture and facilitate a cohesive, high functioning team.

### C. DESIRED EDUCATION, SKILLS, KNOWLEDGE & ABILITIES

- Bachelor’s degree required, J.D., CPA, MBA, or CFP degree/certification preferred.

- 1-3 years of experience with proven track record in a formal philanthropy and/or professional advisor setting, with demonstrated success in stewarding donors / clients.
- Familiarity with gift planning vehicles, including charitable gift annuities, charitable remainder trusts, endowments, and donor advised funds.
- Experience accepting gifts of public securities, life insurance, IRA, etc.
- Experience collaborating with a team of skillful professionals.
- Ability to build relationships with a wide variety of people (diversity of age and financial means) required.
- Familiarity with the local Catholic community and passion for the mission of the Catholic Church required.
- Knowledge of best practices, including portfolio management, database management, and relationship moves management.
- Excellent communication skills (including public speaking) and ability to articulate complex subjects.
- Knowledge of investment management and strategic marketing preferred.

## To Apply

Submit cover letter, resume, and two professional references to CCF Vice President Chris Nelson at [nelsonc@ccf-mn.org](mailto:nelsonc@ccf-mn.org). The position will remain open until filled. All inquiries and applications will remain confidential, and professional references will not be contacted until later in the search process.

The Catholic Community Foundation of Minnesota is an equal opportunity employer.