



CAREER OPPORTUNITY Philanthropy Assistant

Join the Foundation team

The Community Foundation San Luis Obispo County is a dedicated, mission-driven organization committed to serving all of San Luis Obispo County and beyond. Celebrating over 25 years of impact, the Foundation is one of the Central Coast's most important philanthropic resources. Together with donors, grantees, community partners, committees, and our Board, we strive to create meaningful change.

The Philanthropy Assistant will report directly to the Director of Philanthropy and will play a key role in supporting donor services and ensuring smooth administrative operations. This role is ideal for someone detail-oriented, tech-savvy, and passionate about providing excellent donor support.

Core Values:

Collaboration ~ Excellence ~ Inclusion ~ Integrity ~ Stewardship

Who We Are:

The Community Foundation San Luis Obispo County is committed to connecting caring individuals with meaningful causes. As the primary provider of philanthropic services in the region, we help people achieve their philanthropic goals effectively and confidently, backed by an expert team attuned to the needs of our community.

The Foundation manages hundreds of charitable funds for individuals, families, businesses, and nonprofits, with the majority endowed to ensure long-term support for important causes. For 25 years, we have been the region's trusted steward of philanthropic funds and currently manage over \$87 million in charitable assets. Together with our fundholders, we are one of the largest local grant makers in the area, awarding more than \$74 million to support significant causes and 1,500 scholarships to local students. To learn more about our work please visit- www.cfsloco.org.



About the Position

Job Overview

The Philanthropy Assistant, reporting to the Director of Philanthropy, is a key member of the donor services team. This position focuses on the administrative functions of the Foundation's donor services team, delivering excellent customer service to fund holders and prospective donors while assisting with fund administration and reporting. This role requires meticulous attention to detail, outstanding organizational skills, and proficiency with computer systems. This is a full-time, non-exempt position that offers comprehensive benefits.

Donor Services (50%)

- Administer donor acknowledgments.
- Track and organize donor stewardship activities.
- Prepare new fund materials and organize new fund onboarding.
- Orchestrate grant distributions for fund holders, including assembling packets and conducting due diligence on grantees.
- Coordinate logistics for donor-related events, including vendor coordination, RSVPs, program development, and on-site support.
- Prepare prospect research.

Database Management (30%)

- Update forms and templates annually.
- Coordinate and schedule donor follow-up activities.
- Perform data entry and updates in donor management software.
- Generate reports on donor activity and fund development metrics.
- Conduct regular maintenance and audits of donor and fund records.

Committee Support (10%)

- Staff support for Committees
 - Prepare and distribute committee meeting materials, take notes, and track action items.
 - Manage logistics: including meeting dates, RSVPs, technology, supplies.



- Assist in the cultivation, onboarding and recruitment of new members.

Marketing and Communications (5%)

- Manage communication e-news subscription list.
- Coordinate Philanthropy department files including organization and maintenance.
- Generate ideas for subject matter.
- Coordinate participation and content gathering with internal and external members.

Other Essential Functions (5%)

- Support Director of Philanthropy with administrative tasks as needed.
- Provide phone back-up and reception coverage as needed.
- Event support for department and foundation events.
- Other duties as assigned.

Qualifications

- Two years of relevant administrative experience, preferably in a nonprofit organization or private or community foundation with a history of working with donors, committees, and boards.
- Demonstrated ability to interact effectively with diverse individuals and groups. Strong customer service orientation.
- Demonstrable technical skills on PC systems with thorough knowledge of Microsoft Word and Excel.
- Experience with data entry, reporting, and maintenance of software including – FIMS, Excel, MailChimp, Zeffy, etc.
- Superb organizational ability: ability to multi-task, track multiple projects, meet deadlines, and set priorities.
- Excellent written and verbal skills.
- Ability to take initiative and work independently with direction and solve problems with minimum supervision.
- Meticulous attention to detail.
- Ability to handle confidential information.



- Ability to work cooperatively as a team player in a small office.
- Enthusiasm, professionalism, and integrity.
- Complete commitment to the mission of the Foundation.
- Ability to climb stairs and lift 25 pounds.

Career Details

- This is a full-time, non-exempt position.
- **Compensation:** \$27/hour (40 hours per week)
- **Benefits:** Full medical, vision, dental, and retirement plan.
- **Schedule:** In-office position with potential for a hybrid schedule after six months.

The Community Foundation San Luis Obispo County is an equal-opportunity employer. We encourage applications from individuals of all backgrounds and experiences.

To apply please submit cover letter and resume to jobs@cfsloco.org. All applications and letters of interest are handled with complete confidentiality.