



POSITION DESCRIPTION

Advisory Lead, Family Engagement

<https://crownfamilyphilanthropies.org/>

About Crown Family Philanthropies

The Chicago based Crown Family Philanthropies (CFP) supports the Crown Family's philanthropic and grantmaking endeavors. In 2009, after more than 60 years of family grantmaking under the name Arie and Ida Crown Memorial, CFP was developed to represent an array of family grantmaking practices. Today the legacy of Arie and Ida Crown lives on in the work continued by their descendants, who remain dedicated to the Jewish tradition of *tikkun olam*, or "repairing the world." Supported by a professional staff of experts, CFP is led by more than 40 family members across multiple generations who come together to set strategy and make grantmaking decisions.

About Family Engagement

The Family Engagement team at CFP supports the individual and collective philanthropic experience for Crown family members. The team of four professionals facilitates the philanthropic interests through a portfolio of philanthropic advisory services and experiences. Moreover, the team facilitates connections for family members internally with foundation staff who manage programmatic giving and externally with grantee organizations.

About the Position

Reporting to the Director of Family Engagement, the Advisory Lead works with family members to deliver a personalized philanthropic approach to individual and collective grantmaking and engagement.

The Advisory Lead focuses on elevating the personal journey experience for family members and projects related to family engagement. In addition, this position facilitates family member leadership and identifies and evaluates opportunities to define and refine programming and initiatives that enable a large, distinguished, multi-generational family to participate in compelling philanthropic work.

This staff member is responsible for researching and proposing new initiatives, as well as executing developed initiatives, with the family engagement team. The Advisory Lead also works collaboratively with leaders and teams across departments in the Crown Family enterprise including family services, accounting, operations, and information technology to identify and leverage areas of alignment between Company and philanthropic activities. The goal of these activities and initiatives is to facilitate family understanding and participation in philanthropic work and activities and drive social impact.

This role requires a creative thinker who can provide a robust philanthropic service orientation to the family engagement team. Over time, this individual will manage advisory relationships for family members alongside the family engagement director and be responsible for building purpose-driven personal philanthropic journeys for family members. This individual will also focus on special projects, a



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legacy grantmaking docket, and succession planning alongside the family engagement team. Therefore, this individual must be adept at communicating strategic initiatives to stakeholders and diverse internal teams. The candidate should have excellent communication skills among peers and across disciplines and should have the ability to simultaneously tackle multiple projects and challenges with enthusiasm. This individual should have extensive experience in the nonprofit or philanthropic field.

Key Areas of Responsibility:

Philanthropic Advisory Services

- In collaboration with the Director of Family Engagement, refine the process for family members' personal journeys, individual grantmaking, and broader connection to the family's collective giving
- Research and develop grant recommendations for individual family members
- Develop or leverage existing systems or applications that aid family communication, understanding and action on personal or committee grant making
- Process grant requests through the internal grants database and develop the annual End of Year Giving Guide for family and staff
- Maintain an understanding of relevant issues and developments in the field to inform engagement activities and advise grantmaking decisions
- Oversee legacy giving and succession planning alongside the Director of Family Engagement

Special Projects

- Lead and support the creation of tools, activities, programming and initiatives with the Family Engagement team towards the goal of increasing family awareness and participation in philanthropic work
- Define and implement metrics for success of programming and initiatives with Director of Family Engagement, revisit and refine these metrics over time
- Research, identify, analyze and recommend project partnerships with key internal stakeholders or outside vendors or philanthropies that further the goals of family engagement team programming
- Balance multiple priorities, manage multiple complex and overlapping projects, and respond flexibly to shifting priorities

General

- Work collaboratively with the Family Engagement team to develop, implement, and support educational tools and learning opportunities (including in-person sessions, events, and materials) that add value to philanthropic experiences, convey the family's history of philanthropy, and encourage family members to continue that legacy.
- Participate in overall CFP Team activities that advance organizational aims around social impact and family engagement
- Maintain a client-service orientation, ability to thrive in a family-centered enterprise environment, and inquisitive nature
- Stay apprised of significant knowledge of trends and best practices in philanthropy
- Plan and conduct meeting facilitation, public speaking, and relationship management with key stakeholders, including family and staff



Core Competencies

Successful candidates will possess the following Core Competencies:

PHILANTHROPY

- Minimum of five years of progressive experience in a foundation, family foundation or nonprofit, working on program-related issues in the sector
- Broad and rich knowledge of the nonprofit sector
- Experience in the development and implementation of grantmaking processes, communication tools, and evaluation frameworks
- Detail oriented with keen conceptual, analytical, and critical thinking skills

ENGAGEMENT

- Experience developing, engaging, and communicating with dynamic networks of diverse individuals
- Proven record of providing effective, innovative approaches towards encouraging participation in these networks, despite geographic and other challenges to engagement
- Excellent oral and written communication skills, with a demonstrated track record of communicating complex issues succinctly
- Strong active listening skills with the ability to synthesize multiple inputs
- Well-developed social-emotional intelligence needed to facilitate engagement

COLLABORATION AND INTERPERSONAL SKILLS

- Deep experience working with, learning from, and building consensus with internal actors - a highly collaborative team player who enjoys engaging with colleagues, who handles high end strategic work and mundane administrative tasks with the same care, attention to detail and joyful demeanor
- A continuous learner that is eager to receive feedback and grow
- Demonstrated record of balancing leadership and collaborative roles in a team environment
- Experience managing a high volume of work and meeting ambitious deadlines
- Experience that informs the ability to thrive in a family-centered enterprise environment and respond flexibly to shifting priorities
- Demonstrated ability to act with humility, sensitivity, and discretion

Compensation

CFP offers a highly competitive salary, commensurate with experience, and an exceptional benefit package.

Education / Experience

Bachelor's Degree or the equivalent combination of education and experience.

How to Apply

Crown Family Philanthropies has hired Sheila Leahy of SAL Consulting Inc. to support the search process. Inquiries are welcomed at sal.consulting.inc@gmail.com.



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Applications will be reviewed on a rolling basis and interested parties are encouraged to apply early. Crown Family Philanthropies is committed to creating a diverse environment and actively seeks all qualified applicants who will be carefully considered without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

To apply, kindly send the following to cfpsearch.engagement@gmail.com with only your name in the Subject line:

- 1) A cover letter that describes how your skills and experience meet the qualifications outlined in this position description; and**
- 2) Current resume.**