



Search for

Senior Philanthropy Advisor

Location: San Francisco, California

Overview of Climate Leadership Initiative

The climate crisis touches all our lives and impacts everything we hold dear. There is no question that tackling this crisis is a formidable challenge - but the good news is that climate change is a problem with solutions.

Yet less than 2 percent of philanthropic giving goes toward climate solutions. The Climate Leadership Initiative (CLI) was created in 2019 by leading climate philanthropists and foundations to help those with the means to act now, since the climate crisis cannot wait. Every delay means the solutions cost more in money and lives.

CLI is an advisory service designed to help philanthropists find their path to climate impact, supporting those who are new to this cause to move with both urgency and rigor to address the climate crisis and protect our planet for generations to come. When working with CLI, philanthropists can get started quickly and with confidence, receive tailored guidance, and engage with a network of peers and world-class climate experts to help find their place in the climate field.

CLI is fully funded and so does not charge for its services, nor does it pool grant dollars. Rather, the funds flow directly to solutions and organizations. This frees CLI to help philanthropists find the smartest path for them regardless of their theory of change.

Climate change isn't its own cause, it's every cause, because of its ability to threaten progress on any issue - poverty, education, conservation, economic and social justice, public health, and more. It's why CLI works across many sectors and regions to address this far-reaching problem.

For more information on the organization, its funders, and leadership, please visit www.climatelead.org.

How CLI Works

Since CLI's launch in 2019, the organization has helped 64 families move more than \$2.9B for climate impact globally.

CLI is made of up three main teams comprising nearly 40 staff in total and who work together to help donors understand climate solutions and begin to give. The Philanthropy team serves as the relationship managers with donors, proactively helping bring new donors to climate and, once they are interested, helping engage them and building strategies to support their giving at the speed and scale the climate sector needs. This role is a member of that team, whose backgrounds span senior development work to donor advising experience.

Philanthropy collaborates closely with CLI's other two teams - Global Climate Strategies and Communications. GCS works with a network of external experts to source and diligence solutions for donors and help ensure everything CLI does is grounded in impact. This team holds a value of using the existing expertise in the climate ecosystem globally, and helping the wider CLI team to see what is ready for philanthropists. The Communications team helps translate complex content for donors and curate meaningful events to engage them with experts and with one another. The guiding principle for this work is to make it simple for new philanthropists to draw from the proven strategies of trusted peers, see strong emerging strategies, and to learn and give at scale.

CLI does not keep advising philanthropists indefinitely. Rather, it helps develop their pathways into climate and scale their giving. While all donors remain forever a part of the CLI ecosystem, its aim is to launch them to independence and create space to bring others into climate philanthropy.

In addition to new climate donors, CLI also works closely with experienced funders, including on its board. These individuals serve as an "ambassador corps" for climate philanthropy and operate as the core of a much larger network of support for peer outreach, expert advice, and meaningful funding solutions.

The Senior Philanthropy Advisor Role

As the world enters a make-or-break decade for tackling climate change, the Philanthropy team at CLI plays a vital role in guiding new climate philanthropists to the bold, outsized impact needed to address the most profound challenge of our time. Reporting to the Managing Director of the Philanthropy team, the Senior Philanthropy Advisor (SPA) is one of five such positions at CLI focused on three primary goals:

1. Develop strategies to engage new donors for climate;
2. Once engaged, support these new donors on climate by coordinating access to peer funders, sourcing first portfolios, and matching their interests to climate impact solutions; and
3. Finally, engage CLI's experienced climate philanthropists who serve as peer ambassadors by supporting their efforts in connecting new philanthropists to CLI and to climate impact.

The SPA may potentially manage a project manager on the Philanthropy team, which is a resource typically shared between two SPAs, with one filling the role of direct supervisor.

In line with the primary goals noted above, key responsibilities for the SPA include:

Draw In New Philanthropists

- Develop strategies to engage new donors for climate solutions, including evaluating key networks and other options for helping families of means recognize the importance of climate and begin to engage.

- Partner with the Communications team to develop content and strategy for philanthropy-focused events and experiences as part of finding and engaging new donors for climate.

Philanthropic Advising and Engagement

- Design and implement creative and comprehensive donor plans for cultivating philanthropic learning and action on climate for assigned donors/prospective donors (typically a portfolio of around 40 individuals or families). This includes managing strategies to meet and engage donors as well as to help them begin to give and scale their climate giving.
 - Partner with the GCS team to source ideas for “advisee” philanthropists (e.g., interest in giving in Africa or to a sectoral issue such as food systems), or to help flush out an area where new climate philanthropists can start to support (e.g., mapping out a sector or strategy that needs funding), or to help draw in multi-interest donors with multi-solutions projects (e.g., oceans and climate giving).
 - In collaboration with CLI team members and external expert advisors, develop and manage materials to support engagement, including tailored tools for new philanthropists, presentations, proposals, letters of inquiry, meetings, portfolio materials, and special events.
 - Support assigned philanthropists through a process of learning from first gift to fully scaled giving for climate (eight and nine figures and above, generally). This could include designing learning sessions, portfolio creation (with the GCS team), connection to peer ambassadors, and helping determine first criteria or other touchpoints as needed.
- Coordinate and track activities, proposals, commitments, and reports using CLI’s donor engagement database (Salesforce). Use and contribute to CLI’s knowledge management system for solution materials as well.
- Support philanthropists’ long-term commitment to climate philanthropy and maintain CLI’s professional relationships and visibility with key donor and partner NGO networks; mobilize these networks to identify new donors for climate and scale their giving.
- In collaboration with the full Philanthropy team, set strategies annually to meet yearly and five-year goals; iterate based on learnings.

Support Experienced Peer Ambassadors

- Manage the work of select members of the peer ambassador corps who are experienced climate donors that will support their engagement activities of new prospective donors and to will help those donors begin to give at scale. This includes:
 - Coordinating with ambassador family offices and staff on regular meetings to keep up touchpoints with new potential climate donors.
 - Supporting ambassadors in tracking and engaging new climate donors by providing briefs and support strategies, attending meetings when appropriate, and ensuring follow up and next steps.
 - Evaluating how effectively these peer ambassadors engage new climate donors, iterate on CLI strategies, and on ambassador choices.
 - Serving as the main liaison with assigned ambassadors for all of CLI.

Ideal Candidate Profile

CLI seeks a Senior Philanthropy Advisor who is passionate about the impactful role philanthropy can have on one of the most critical issues of our time. Operating as a credible champion for the climate

sector and a trusted advisor to philanthropists, the SPA will be supporting a sophisticated global ecosystem to move billions into climate in the coming years. To be successful, candidates must understand how donors operate at this level of giving, how to build relationships with them that are authentic, and how to spur them into action with the speed and scale this issue requires through engagement, learning, listening, and advising.

Expertise in principal development work or donor advising is critical for this role. For those attracted to a dynamic start-up venture and who are focused on mission-driven work, this is an unparalleled opportunity to contribute to an important global effort addressing the climate crisis.

The ideal candidate will enjoy analyzing big ideas and solutions, understanding what is needed for impact so that new waves of philanthropists will fund what is needed to move the needle on climate, and then translating these ideas into actionable plans for philanthropists. The ability to advance complex strategies when information is imperfect, and the agility to adapt and change direction or navigate evolving circumstances is essential in order to effectively guide philanthropists towards impactful giving.

Defining personal characteristics for the SPA include creativity, humility, diplomacy, transparency, professionalism, graciousness, discretion, and trustworthiness. Candidates must have a strong work ethic, intellectual curiosity, a sense of humor, and an ability to map uncharted territory in order to achieve desired outcomes. Outstanding communication skills (verbal and written) as well as active listening and convening capabilities are all critical for this role.

Additional success factors for the SPA include:

- **Advisory Orientation:** Enjoys working in both a consultative and action-oriented environment, using strategy, persuasion, and influencing skills to mobilize philanthropists and networks. Demonstrated agility and flexibility in ambiguous or changing circumstances. Appreciates the iterative process for evaluating and scaling climate strategies and solutions. A diligent learner around outcomes and results.
- **Driving Results:** Translates priorities into operational reality; aligns communication, accountabilities, resource capabilities, internal processes to ensure efforts yield results; a solid project manager who is organized and clear with work plans and goals, including tracking priorities and progress.
- **Entrepreneurial and Hands-On Spirit:** Self-starter with a strong entrepreneurial orientation who thrives in a fast-paced venture that is, in essence, a start-up. Energized by helping to build something new and innovative. Capable of being both a strategic contributor and hands-on implementer. Highly adaptable and flexible and embraces a culture that requires responsiveness and elasticity in the operating environment of a growing start-up doing something entirely new in philanthropy.
- **Embrace Collaborative Teams:** Brings a genuine respect for CLI's powerful collaboration model, working in a participatory way across the organization and through CLI's extensive global networks to achieve shared goals. A demonstrated track record of being an excellent collaborator on high performing and matrixed teams.
- **Leadership & Action:** Active inquiry and learning; thrives by creatively synthesizing ideas and input from multiple sources, and an ability to recognize excellence; can pinpoint key questions, distill frameworks, and weigh competing points-of-view.
- **People Intelligence & Inspiration:** Considers multiple points of view with ease and encourages constructive, balanced discussions to drive innovation and progress, while simultaneously being able to hold onto the bigger picture. Sophisticated understanding of

what motivates someone and how to build solutions that are inspiring and responsive to their needs. Invites candor and a temperament that deploys a sensitive touch in teasing out points of disagreement.

- **Climate Sector Experience:** Direct experience working in climate-focused organizations is a plus, but not required.

Candidates must have a minimum of ten years of progressively responsible experience in philanthropic advising in a firm or family office setting, or in a relevant consulting context, or in senior development roles.

To Be Considered

At the Climate Leadership Initiative, we value diversity and always treat all employees and job candidates based on merit, qualifications, competence, and talent. We do not discriminate on the basis of, or traits historically associated with race, color, religion, religious creed, national origin, ancestry, citizenship, physical or mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, veteran and/or military status), domestic violence victim status, political affiliation, and any other status protected by state or federal law.

Position Salary, Location & Travel

The salary range for the SPA is \$230,000 to \$270,000, depending on experience, and comes with a highly competitive benefits package. Occasional domestic travel is required, with less frequent international travel possible as well. The SPA is expected to work onsite at CLI's primary office in San Francisco, California. Relocation support is available. CLI staff in San Francisco currently work in the Ferry Building offices Tuesday through Thursday each week and typically work from a home location the other days.

Submit Materials

CLI values, celebrates, and supports a diverse and inclusive environment throughout its organization. All qualified candidates who contribute to CLI's broad commitment to diversity are strongly encouraged to submit their materials for consideration.

The search for CLI's Senior Philanthropy Advisor is being led by:

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Senior Advisor

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