



Job Description

POSITION TITLE: Donor Services Coordinator

DEPARTMENT: Donor Services and Gift Planning

LOCATION: Community Foundation for the Fox Valley Region 4455 W. Lawrence St.
Appleton, WI 54914

REPORTING TO: Carissa Kranz, Donor Services Manager

FLSA CLASSIFICATION (EXEMPT OR NON-EXEMPT): Non-Exempt

SCHEDULE: Part-time Benefits Ineligible – .5 FTE/20 hours per week Monday-Friday. Hours flex between 7:00 a.m.-4:30 p.m.

LAST UPDATED: January 18, 2022

POSITION SUMMARY

The **Donor Services Coordinator** is part of the Foundation's dedicated team of professionals who work together under the core values of integrity, respect, teamwork, stewardship, and diversity, equity, inclusion, and antiracism (DEIAR) to support the strategic direction and mission of the Foundation, strengthening our community for current and future generations by helping people make a difference in the lives of all.

The **Donor Services Coordinator** works independently and as part of a team to fulfill responsibilities primarily related to donor centric granting and development, project planning, and assisting prospective and existing donors, professional advisors, nonprofit organization representatives, and other functions within the Donor Services and Gift Planning Team and Foundation. The **Donor Services Manager** will provide the strategic direction and planning guidance to ensure alignment with the Foundation's relationships with prospective and existing stakeholders.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Fundamental Responsibilities

- Coordination, documentation, and workflow of fund management, grant cycles, supporting organizations, geographic affiliate foundations and committees. Including, but not limited to, fund documentation, online grant applications, constituent records and grant reports.
- Provide planning and coordination to support gift planning and donor services work with prospective donors, fund contacts, donor recommended granting and receiving gifts.
- Coordination of data, reports, and communication. Generate data and database-driven reports.
- Create and compile committee information including posting documents to board and committee online web portals.
- Plan, arrange, schedule, and support a variety of virtual and in-person meetings and special events. This includes drafting agendas, taking and preparing detailed minutes and notes, interacting with committee volunteers, preparing and editing correspondence, reports, memos, and setting up visual presentations and special events.
- Support Donor Services & Gift Planning with a full range of professional service and support related to the Foundation's strategic direction and mission.

This job description describes the general nature and scope of responsibilities for this position. Please note other duties and responsibilities may be assigned or removed at any time.

EDUCATION AND/OR EXPERIENCE

- A minimum of three years of combined experience with project coordination, nonprofit development, database management, administrative support experience or a related field is required.
- Proficient use of Office 365, including Word, Excel, Outlook, PowerPoint, and Teams, and virtual meeting platforms such as Zoom.
- Proficient with project coordination.
- Experience working with CRM software systems and relational databases, such as Blackbaud or Foundant. Raiser's Edge, Financial Edge, and GrantEdge experience a plus.
- Preferred experience working in a hybrid virtual/in office work environment.

KNOWLEDGE, SKILLS AND ABILITIES

- Able to demonstrate teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.
- Excellent written and verbal communication skills.
- Exceptional customer service skills.
- Effective time management to manage multiple concurrent, and often changing, projects, priorities, and deadlines in a fast-paced team environment.
- Willingness and enthusiasm to learn and contribute.
- Ability to engage and interact with internal teams to resolve issues timely and accurately.
- Continuous improvement skills for process efficiency.
- Excellent organizational skills and keen attention to detail.
- Able to handle sensitive and confidential information and maintain a high level of confidentiality.
- Ability to work independently with minimal supervision.

WORK ENVIRONMENT AND JOB SPECIFICATIONS

The work environment and job specifications listed below are representative of those that must be met by an employee, with or without accommodations, to successfully perform the essential functions of this job.

- Primarily perform work in an office environment.
- Frequently move around the office and access or use computers, office equipment, telephone, and any other pertinent supplies, space or equipment used to perform the duties of the position.
- Work with frequent interruption.
- Sit for long periods of time.
- Lift and/or move up to 10 pounds and occasionally lift and/or move up to 20 pounds.
- Travel occasionally to surrounding area businesses for events, meetings, etc.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.