



Job Description

POSITION TITLE: Donor Services Manager

DEPARTMENT: Donor Services & Gift Planning

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

REPORTING TO: Assistant Vice President of Donor Services & Gift Planning

FLSA CLASSIFICATION (EXEMPT OR NON-EXEMPT): Exempt

CLASSIFICATION: Full-Time Benefits Eligible

LAST UPDATED: February 15, 2023

POSITION SUMMARY

The **Donor Services Manager** 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 Manager** is responsible for executing and strengthening the Foundation's strategic goal of growing philanthropy through donor development; supporting the Foundation's donor services and gift planning efforts to steward new and existing donors/fund advisors and provide oversight and administration of supporting organizations and geographic affiliates. The Assistant Vice President of Donor Services & Gift Planning will provide strategic direction and planning guidance to the **Donor Services Manager** to ensure alignment with the Foundation's strategic development plan.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Fundamental Responsibilities

- Manage a portfolio of various fund types as assigned with a goal of furthering the donors/fund advisors' charitable giving. Deliver services that are consistent with the Council on Foundations' National Standards and align with the Community Foundation's strategic plan, development plan, and service model to include, but not limited to: executing donors' intentions, facilitating donor requests, assist donors in forming strategies for philanthropic giving, proactively align donors' interests with community needs, and stewarding donors' philanthropic legacies.
- Manage and strengthen relationships with fund advisors, Foundation's supporting organizations, and geographic affiliate funds to include excellent, timely, and efficient service to boards, committees, and families. Ensure supporting organizations and geographic affiliate boards function effectively including oversight of terms and recommendations for new members, adherence to bylaws, policies, and operational agreements, administer grant cycles, acceptance of gifts and efficient meeting and decision-making practices.
- Manage the Foundation's relationships with grant committees and granting programs for assigned funds and serve as contact for grant inquiries and grant processes.
- Help develop and implement the Foundation's donor engagement strategies to ensure all donors receive excellent, timely, and integrated service and move up on the engagement continuum.
- Prepare all appropriate correspondence and documentation relating to donor intent and goals, including notes, addendums and updated fund agreements articulating necessary revisions and alignment with donors/fund advisors' intentions.

- Encourage donors/fund advisors' continued involvement in giving through the Foundation by discussing legacy plans and responding to cues that signal opportunity for an estate provision, additional contribution(s) or new fund(s).
- Partner with Director of Gift Planning to establish new funds as requested, including meeting with prospects and assisting with fund documentation.
- Identify opportunities to connect donors/fund advisors' philanthropic goals with the Foundation's strategic priorities for serving the community; partnering with nonprofits to address unmet needs.
- Ensure high-quality donor/fund advisor experience through various communication touchpoints (e.g., email, telephone, events, site visits, mailings, onboarding, etc.).
- Work with Foundation staff to plan and execute events that elevate the work and relationships with donors/fund advisors; develop and conduct educational opportunities for donors/fund advisors to help connect them to the Foundation and emerging community needs.
- Understand philanthropy and diverse donor types, with familiarity of legal and tax issues related to charitable giving; keep current on regulatory issues and national best practices.
- As required or requested, represent the Foundation at community, donor, professional advisor, and grantee functions.

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

- Bachelor's degree (or equivalent work experience) is preferred. In addition, five years of experience in philanthropic services, development, nonprofit, foundation or similar environment; experience with budgeting and working with boards and/or committees required; background in development, community relations or sales/customer-service preferred.
- Knowledge of outright and planned gift fundamentals and financial/legal aspects of charitable giving.
- Experience working with CRM software systems and relational databases, such as Foundant or Blackbaud.
- Experience working in a hybrid virtual/in office work environment.

KNOWLEDGE, SKILLS AND ABILITIES

- Able to demonstrate the values of teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.
- Excellent written and verbal communication skills and in speaking with people.
- Exceptional customer service skills.
- Critical thinking skills and the emotional intelligence to work with our donors, board and committee members.
- Understanding of database organization and concepts.
- Understanding and addressing complex challenges with mature judgement, high integrity and professional demeanor.
- Position requires being a self-starter. Exceptional organization, planning and workload prioritization skills, accuracy, attention to detail, ability to multi-task, team oriented, with the ability to work independently, and problem-solving skills are necessary.
- Proficient knowledge in Microsoft programs such as Word, Excel, SharePoint, Teams and Outlook and the ability to master various software applications.
- Confidentiality of the information with which the individual has contact must be maintained.

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.