



## Flourish with us as our Donor Services Manager!

Join our team of dedicated professionals in strengthening our community for current and future generations by helping people make a difference in the lives of all.

As the Donor Services Manager, you will work independently and as part of a team to fulfill responsibilities primarily related to our largest donor advised fund, the *David L. and Rita E. Nelson Family Fund* (the Nelson Fund), as well as other funds of all types within the Community Foundation's Donor Services & Gift Planning department. This position is responsible for managing the Nelson Fund processes, projects, relationships, and serving as the Community Foundation's lead professional support and representation for the fund. The Donor Services Manager will attend events in and conduct routine visits to Brown County, Door County, and Outagamie County sites. This position is also responsible for executing and strengthening the Foundation's strategic goal of growing philanthropy and stewarding new and existing fund advisors through managing a portfolio of funds. The Director of Donor Services will provide strategic direction and guidance to this position.

If you have a bachelor's degree and at least five years' experience working in philanthropic services, development, nonprofit, foundation or similar environment, we want to hear from you! Qualified candidates must also have experience working with budgets, basic investing and fund financial activity, boards and/or committees and understanding CRM functionality such as Foundant. Strong knowledge of nonprofits in Brown, Door, and Outagamie Counties preferred. Please see the detailed job description below.

We have been certified since 2022 as a silver-level Employee Friendly Workplace by the Fox Cities Chamber of Commerce. This certification recognizes employers who demonstrate a significant commitment to promoting work/life integration by creating a positive work environment and experience for all employees.

We offer a flexible and hybrid working environment. Our team currently works in our office at 4455 W. Lawrence Street in Appleton, WI, or remotely in or near the Fox Valley area. In addition to a flexible working environment, it is important to us to offer a generous benefit package to our team members. Our current package includes medical, dental, and vision insurance, 401(k), paid time off, paid volunteer hours, and professional development. This is a full-time, benefits eligible position. The salary range starts at \$76,600 annually. A start date no later than July 2025 is preferred.

We are excited to learn more about your experience! **Please submit your resume and cover letter to [careers@cffoxvalley.org](mailto:careers@cffoxvalley.org) using the following email subject line: Donor Services Manager.**



## 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:** Director of Donor Services

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

**CLASSIFICATION:** Full-Time Benefits Eligible

**LAST UPDATED:** May 12, 2025

### POSITION SUMMARY

The **Donor Services Manager** is part of the Foundation's dedicated team of professionals who work together under the core values of belonging, integrity, respect, stewardship, and teamwork, 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. The Director of Donor Services 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'/fund advisors' intentions, facilitating donor/fund advisor requests, assist donors in forming strategies for philanthropic giving, proactively align donors'/fund advisors' interests with community needs, and stewarding donors'/fund advisors' 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.
- 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/fund advisor engagement strategies to ensure all donors/fund advisors 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 is required.
- 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.

#### **KNOWLEDGE, SKILLS, AND ABILITIES**

- Able to demonstrate the values of belonging, integrity, respect, stewardship, and teamwork throughout work and interactions.
- Exceptional customer service skills. Excellent written and verbal communication skills in person, over the phone and in email.
- 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.
- Self-starter with 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 Office 365 such as Word, Excel, SharePoint, List, 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.***