



Flourish with us as our Director of Donor Services!

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 Director of Donor Services, you will work closely with the Vice President of Donor Services & Gift Planning and the Director of Gift Planning in providing leadership for a comprehensive donor services and gift planning program that advances the mission of the Community Foundation. You will be responsible for executing and strengthening the Community Foundation's strategic development plan, ensuring goals are attained, supporting efforts to steward new and existing fund advisors and providing oversight and administration of supporting organizations and geographic affiliates. This role serves a key role on the Community Foundation's Leadership Team, and includes leading a team, managing a portfolio of various fund types and representing the voice of fund advisors on the Community Foundation's DEIAR Committee.

If you have a bachelor's degree and/or at least seven years of 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, and boards and/or committees and understanding CRM functionality such as Foundant or Blackbaud. Please see the detailed job description below.

We have been certified as a 2022 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 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 health and dental insurance, 401(k), paid time off, paid volunteer hours, and professional development. This position is a full-time, benefits eligible position. The salary range starts at \$100,000. A start date no later than July 8, 2024 is preferred.

We are excited to learn more about your experience! **Please submit your resume and cover letter to careers@cffoxvalley.org using the following email subject line: Director of Donor Services.**



Job Description

POSITION TITLE: Director of Donor Services

DEPARTMENT: Donor Services & Gift Planning

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

REPORTING TO: Vice President of Donor Services & Gift Planning

FLSA CLASSIFICATION (EXEMPT OR NON-EXEMPT): Exempt

CLASSIFICATION: Full-Time Benefits Eligible

LAST UPDATED: May 30, 2024

POSITION SUMMARY

The **Director of Donor Services** is part of the Community Foundation's dedicated team of professionals who work together under the core values of integrity, respect, teamwork, stewardship, and diversity, equity, inclusion, & 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 **Director of Donor Services** works closely with the Vice President (VP) of Donor Services & Gift Planning and the Director of Gift Planning in providing leadership for a comprehensive donor services and gift planning program that advances the mission of the Community Foundation. This person is responsible for executing and strengthening the Community Foundation's strategic development plan to ensure the goals are attained, supporting the Foundation's donor services and gift planning efforts to steward new and existing donors, and provide lead oversight and administration of supporting organizations and geographic affiliates. This position serves a key role on the Community Foundation's Leadership Team. The VP of Donor Services & Gift Planning will provide strategic direction and planning guidance to ensure alignment with the Foundation's strategic development plan.

ESSENTIAL DUTIES AND RESPONSIBILITIES

FUNDAMENTAL RESPONSIBILITIES

STRATEGIC LEADERSHIP

- Assist the VP of Donor Services & Gift Planning to advance the Community Foundation's donor engagement strategies to ensure fund advisors and donors receive excellent, timely and integrated service and information that promotes upward movement on the engagement continuum.
- Collaborate with the VP of Donor Services & Gift Planning and the Director of Gift Planning to grow outreach to various constituent groups to promote the Community Foundation's expertise in philanthropic, tax and legacy planning, along with its unique insights into community needs and opportunities.
- Identify opportunities to systematically grow connections between fund advisors' philanthropic goals and the Foundation's strategic priorities for serving the community and highlighting nonprofits' unmet needs.
- Serve as backup to the Director of Gift Planning in the creation of new funds.

LEAD TEAM

- Lead a team of donor services professionals to advance fund advisors' connections to the Community Foundation by intentionally cultivating relationships through the annual donor advised fund review process with them, their family members, donors, potential donors, professional advisors, and other community members.

- Direct a team of staff members working with designated, field of interest, and agency funds, as well as supporting organizations and geographic affiliate funds to include excellent, timely, and effective service to boards, committees, and families.
- Represent the Donor Services Department and serve as the voice of fund advisors on the Community Foundation's DEIAR Task Committee as part of the strategic development plan.
- Work with Foundation staff to plan and execute events that elevate the work and relationships with fund advisors in addition to developing and conducting educational opportunities to help connect stakeholders to the Foundation and emerging community needs.

PORTFOLIO

- Manage a portfolio of various fund types as assigned with a goal of furthering the fund advisors' charitable giving. Deliver donor services that are consistent with Council on Foundations' National Standards and align with the Community Foundation's strategic direction, strategic development plan and service model to include, but not limited to: execute fund advisors' intentions, facilitate fund advisors' requests, assist with forming philanthropic giving strategies, and proactively align fund advisors' interests with community needs.
- Manage assigned supporting organization and geographic affiliate boards to ensure they function effectively including oversight of terms and recommendations for new members, adherence to bylaws, policies, and operational agreements, administer grant cycles, acceptance of contributions, and efficient meeting and decision-making practices.
- Manage the Community Foundation's relationships with grant committees and granting programs for assigned funds and serve as contact for grant inquiries and grant processes.
- Prepare all appropriate correspondence and documentation relating to fund advisor intent and goals.
- Encourage fund advisors' continued involvement in giving through the Community 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 the Director of Gift Planning to establish new charitable funds, including meeting with prospects and assisting with fund documentation.
- Keep current on regulatory issues and national best practices of philanthropy, with familiarity of legal and tax issues related to charitable giving.
- As required or requested, represent the Foundation at community, fund advisor, 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

- Minimum of a bachelor's degree and/or at least seven years of equivalent experience in philanthropic services, development, nonprofit, foundation, or similar environment. Experience with budgeting, explaining basic investing and fund financial activity, and working with boards and/or committees required. Background in development, community relations, or sales/customer-service preferred.
- Attained designation as a Chartered Advisor in Philanthropy (CAP) or commitment to attain designation within two years.



- Knowledge of outright and planned gift fundamentals and financial/legal aspects of charitable giving.
- Experience in a leadership role and supervising a team of people.
- Experience with and understanding of CRM functionality is preferred.

KNOWLEDGE, SKILLS, AND ABILITIES

- Able to demonstrate teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.
- Excellent written and verbal communication skills in addition to effectiveness when speaking with people in-person and on the phone.
- Exceptional customer service skills.
- Critical thinking skills and the emotional intelligence to work with Community Foundation team members, fund advisors, donors, board, and committee members.
- Understanding of database organization and concepts.
- Understand and address complex challenges with sound 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 be a problem solver.
- Proficient knowledge in Microsoft programs such as Word, Excel, SharePoint, Teams and Outlook and the ability to master various software applications.
- Maintain confidentiality of the information with which the individual has contact.
- Understanding of philanthropy, diverse donor types, and familiarity of legal and tax issues related to charitable giving.

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 extended periods of time.
- Lift and/or move up to ten pounds and occasionally lift and/or move up to twenty 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.