



## Charitable Giving Coordinator

### PURPOSE OF POSITION

The Charitable Giving Coordinator provides support to enhance the function of the Charitable Giving and Affiliate Teams. The Charitable Giving Coordinator ensures current and prospective fund holders receive a personal approach to philanthropy through outstanding customer service. This position works closely with staff on the Charitable Giving and Affiliate Teams to implement strategies to ensure donors' philanthropic objectives are met, their knowledge of the community is broadened and their relationship with the Community Foundation is strong. The Charitable Giving Coordinator is responsible for providing support to prospective donors, current fund holders, and Community Foundation staff related to fund administration. The Charitable Giving Coordinator is an integral part of Charitable Giving customer service including coordination and support of events.

### CORE COMPETENCIES

Dependability | Adaptability/Flexibility | Customer Focus | Attention to Detail | Discernment

### DUTIES AND RESPONSIBILITIES

#### Administration

- Provides excellent customer service to current and prospective fund holders and community stake holders.
- Maintains confidentiality of Community Foundation affairs in communications, both written and oral, and assure such through appropriate filing and disposal of materials.
- Serves as a lead staff member for Manage My Fund, the Community Foundation's online charitable giving fund management tool, including grantmaking assistance for fund holders and general inquiries.
- Assists in adherence to customer service standards related to donor services.

#### Charitable Giving Support

- Has a strong understanding of the charitable giving process in order to provide support. This includes, but is not limited to fund types, required forms, donor information, fund holder prospecting correspondence and data entry, including the Donor Development Cycle in iPhi, the Community Foundation's database system.
- Updates current and prospective fund holder records as directed by Charitable Giving staff.
- Lead staff member to enter Endow Iowa Tax Credit applications in State of Iowa database and maintains relationship with Iowa Economic Development Authority.
- Provides support to inquiries from fund representatives including updating contact information, updating passwords and facilitating grantmaking requests via Manage My Fund.
- Produces reports and summary data to support activities such as: prospective fund holder tracking, goal monitoring, etc.
- Facilitates coordination of new fund holder welcome meetings and/or calls.
- Serves as relationship manager role for assigned charitable giving funds.

#### Charitable Event Coordination

- Provides coordination and support for Charitable Giving related events including prospective and current fund holder events and professional advisor events.
- Works closely with Marketing Team to ensure event registration, coordination and communication.
- Assists with reports related to events.

### **Affiliate Relations Support**

- Assists with affiliate grantmaking processes and procedures.
- Processes new affiliate fund agreements.
- Assists with affiliate fund holder record keeping such as updating contact information, passwords and assisting with grantmaking requests via Manage My Fund.

### **QUALIFICATIONS**

Excellent analytical and organizational skills; mature judgment and critical thinking ability; innovative problem solver; proven ability to manage multiple projects and tasks simultaneously, set priorities, handle numerous responsibilities, and work both independently and in a team environment. Excellent interpersonal and customer service skills, adaptable attitude, self-starter, creative, require little regular supervision. Able to interface well with a variety of people and effectively present information to customers, clients, volunteers and other employees of the organization. Ability to apply common sense understanding to carry out as well as develop instructions; excellent writing, proofreading and communication skills. Strong computer, database management and internet research skills.

#### **Education and Experience**

Bachelor's degree preferred. Related project management experience preferred. Equivalent combination of education and experience will be considered. Prior data/project management experience desired with knowledge of databases and Microsoft Excel; prior fundraising experience and community knowledge strongly preferred.

#### **Language Ability**

Excellent writing, proofreading and critical thinking skills. Must have excellent interpersonal and communication skills. Ability to effectively present information to customers, clients, and other employees of the organization. Excellent telephone and customer service skills.

#### **Cognitive Demands**

Proven ability to manage multiple projects and tasks simultaneously, set priorities, handles numerous responsibilities, and work both independently and in a team environment. Adaptable attitude, attention to detail, organized self-starter, and creative. Able to interface well with a variety of people. Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.

#### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is frequently required to use hand to finger, handle or feel. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision.

### **APPLICATION PROCESS**

Interested applicants should submit their resume, cover letter and salary requirements [via this electronic form](#). We encourage anyone considering the position to apply. The Community Foundation is committed to pay equity and provides a comprehensive compensation package which includes annual salary and benefits benchmarking. Salary range will be shared with candidates prior to the interview process, or [upon inquiry](#). Initial applications will be accepted until the appropriate candidate is identified.