Position Description
Director of Donor Services

DIRECTLY REPORTS TO: CEO

POSITION SUMMARY

Supports the Community Foundation's mission to enrich the quality of life in north central Wisconsin as a key member of our executive team, and as an ambassador for the organization. The Director of Donor Services leads the Foundation's new donor development efforts. Primary responsibilities include oversight of a comprehensive program to identify, cultivate, and steward new and existing donors by facilitating outright and planned gifts that fulfill donors' charitable goals while strengthening our quality of life in north central Wisconsin.

DUTIES AND RESPONSIBILITIES

Asset Development

- Work closely with the CEO and board of directors to spearhead the Foundation's efforts to identify, cultivate, and steward new donors
- Work with the CEO and the board of directors to develop a comprehensive asset development plan
- Oversee the strategic and administrative aspects of the Foundation's development/gift-planning efforts
- Establish annual development goals and objectives; track staff and volunteer activity, and productivity
- Develop and oversee a charitable gift annuity program - prepare documentation, including tax calculations, relating to new and/or established gift annuities; coordinate recording and reporting
- Report to the Foundation board, the CEO, and/or appropriate committees regarding development activities

Donor Relationships

- Prepare appropriate correspondence, documentation, and records relating to donor intent and goals
- Provide leadership on administrative aspects of development and gift-planning efforts, including proper documentation of charitable funds and gift plans; recording and analysis of prospect and planned gift information; and generation of acknowledgement letters for extraordinary gifts, such as those establishing charitable funds, involving non-cash assets, or reflecting estate provisions
- Monitor, interpret, and disseminate information about relevant tax and legal developments to staff, professional advisors, donors, and local non-profit organizations
- Assist agency fund holders with gift acceptance and provide ongoing education around accepting non-cash gifts through the Foundation
- Assist with gift planning sessions for staff, agency fund holders and affiliates

Special Events

- Participates with the team in planning and executing special events such as:
    - Donor Recognition Events
    - George L. Ruder Forum
    - Professional Advisors Seminars
- Assist with special projects as planned or requested by the CEO

Legacy Society

- Listen for opportunities to encourage membership in Legacy Society among eligible donors
- Maintain regular contact with members

Professional Advisor Relationships

- Nurture relationships with professional advisors
- Meet regularly with accountants, attorneys, financial planners, insurance advisors, trust officers, wealth managers, and other advisors to foster familiarity and engagement with the Foundation
- Assist with educational and/or networking opportunities for advisors
- Upon request, provide in-office or outside presentations about the Foundation and/or charitable giving to advisors and/or select clients
- Acknowledge professional advisors and estate planners for their work with clients that have connected with the Community Foundation

Regional Community Partners

- Assist community leaders in regional communities with their development efforts

SKILLS AND QUALIFICATIONS

- Highest level of professionalism, integrity, and ethics
- Passion and commitment to the people and communities of north central Wisconsin
- Excellent oral, written and interpersonal communication skills
- Knowledge of outright and planned gift fundamentals, and financial and legal aspects of charitable giving
- Proven track record of success and demonstrated results
- Patience, flexibility, open-mindedness, and a sense of humor
- Highly motivated with strong attention to detail and organization
- Ability to work independently and as part of a team
- Investment knowledge a plus
- Minimum of a B.A. degree in business, marketing, finance, development, non-profit management, or a related field and at least five years' experience working in development, planned giving, sales/customer service, finance, or a related field