Flourish with us!

We're hiring a Donor Services & Finance Coordinator to join our team of dedicated professionals with a passion for philanthropy, advancing well-being for all and creating vibrant communities in the Fox Valley region of Wisconsin where together, everyone flourishes.

OUR MISSION

Strengthening our community for current and future generations by helping people make a difference in the lives of all.

We fulfill our mission by creating legacies of giving through the management of charitable funds created by generous individuals, families and organizations. These funds generate grant dollars that are awarded to nonprofit organizations addressing ever changing community needs, primarily in Calumet, Outagamie, Shawano, Waupaca and the Neenah/Menasha area of Winnebago counties and beyond.

The Community Foundation’s history and growth reflects the caring, generous spirit of our region. Since our inception 35 years ago that started with $5,000 and the vision of our founder, Walter L. Rugland, grants to nonprofit organizations from the charitable funds with the Foundation now total $388 million. We’ve grown to become the second largest certified community foundation in Wisconsin and among the top 10% nationwide.

cffoxvalley.org

OUR VALUES

Responsibilities and expectations of this and all positions with the Community Foundation align with these core values, which are woven into our new strategic vision, activities of our TLC (Teaming, Learning, Culture) Committee and everything we do in service of our mission:

- **Respect** – We treat each person and organization with dignity and esteem and as a partner in our shared goal to improve individual and community well-being.
- **Integrity** – We steward resources responsibly, making thoughtful and transparent decisions, and keep our promises and commitments.
- **Teamwork** – We engage in fulfilling our mission together in a culture of abundance where our skills, talents and other resources foster the outcomes none of us could produce alone.
- **Stewardship** – We show gratitude for the gifts and trust we are given, fulfilling our commitments with humble care and service.
- **Diversity, Equity, Inclusion and Antiracism** – We foster a culture where all are valued, feel they belong and can contribute to our mission. We invite diverse participation in our work, remove barriers to opportunity, and strive toward fair and inclusive access to resources and the opportunity for all of the Fox Valley region’s people and communities to achieve their full potential.

KEY RESPONSIBILITIES

This position encompasses donor service and finance responsibilities:

- Coordination, documentation, and workflow of fund management, grant cycles, supporting organizations, geographic affiliate foundations and committees. Including, but not limited to, fund documentation, online grant applications, constituent records and grant reports.
• Provide planning and coordination to support gift planning and donor services work with prospective donors, fund contacts, donor recommended granting and receiving gifts.
• Support finance staff with financial audit, creating new vendors and processing invoices.
• Liaison between Donor Services & Gift Planning and Finance departments.

REQUIREMENTS

• A Minimum of three years of combined experience with project coordination, nonprofit development, database management, administrative support experience or a related field is required.
• Exceptional customer service skills.
• Proficient use of Office 365, including Word, Excel, Outlook, PowerPoint, and Teams, and virtual meeting platforms such as Zoom.
• Strong oral and written communication skills.
• Proficient with project coordination.
• Manage multiple, and often changing, daily tasks and priorities in a fast-paced team environment.
• Ability to engage and interact with internal teams to resolve issues timely and accurately.
• Effective time management to handle multiple concurrent projects and deadlines.
• Continuous improvement skills for process efficiency.
• Excellent organizational skills and keen attention to detail.
• Able to handle sensitive and confidential information and maintain a high level of confidentiality.
• Experience working with a CRM software systems and relational databases, such as Blackbaud or Foundant. Raiser’s Edge, Financial Edge, and GrantEdge experience a plus.
• Preferred experience working in a hybrid virtual/in office work environment.

LOCATION, PAY RATE AND START DATE

Our team is currently working in a flexible, hybrid work approach at our newly expanded and renovated office at 4455 W. Lawrence St. Appleton, WI, and remotely during the Covid-19 pandemic.

We offer a competitive pay rate commensurate with experience, flexible work schedule and generous benefits including: paid time off and volunteer hours, multiple types of insurance, 401(k), Employee Assistance Program, professional development, YMCA membership contribution. A start date no later than early December is preferred.

HOW TO APPLY

Submit your resume and cover letter to careers@cffoxvalley.org. Please use the following email subject line: Donor Services & Finance Coordinator Position.
**Position Title:** Donor Services & Finance Coordinator  
**Department:** Donor Services & Gift Planning and Finance  
**Location:** Community Foundation for the Fox Valley Region 4455 W. Lawrence St. Appleton, WI 54914  
**Reporting To:** Vice President Donor Services & Gift Planning  
**FLSA Classification (Exempt or Non-Exempt):** Non-Exempt  
**Schedule:** Full-time – 40 hours per week Monday-Friday. Hours flex between 7:00 a.m. – 4:30 p.m.  
**Last Updated:** October 8, 2021  

**Position Summary**  
The Donor Services & Finance Coordinator 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 & Finance Coordinator works independently and as part of a team to fulfill responsibilities primarily related to donor centric granting and development, project planning, and assisting prospective and existing donors, professional advisors, nonprofit organization representatives, and other functions within the Donor Services and Gift Planning and Finance Teams and Foundation. The Vice President of Donor Services and Gift Planning and Chief Financial Officer will provide the strategic direction and planning guidance to ensure alignment with the Foundation’s relationships with prospective and existing stakeholders.  

**Essential Duties and Responsibilities**  
**Fundamental Responsibilities**  
- Coordination, documentation, and workflow of fund management, grant cycles, supporting organizations, geographic affiliate foundations and committees. Including, but not limited to, fund documentation, online grant applications, constituent records and grant reports.  
- Provide planning and coordination to support gift planning and donor services work with prospective donors, fund contacts, donor recommended granting and receiving gifts.  
- Support finance staff with financial audit, creating new vendors and processing invoices.  
- Liaison between Donor Services & Gift Planning and Finance departments.  
- Coordination of data, reports, and communication. Generate data and database-driven reports.  
- Coordinate content-specific communications for both Donor Services and Gift Planning and Finance.  
- Create and compile committee information including posting documents to board and committee online web portals.  
- Assist in the annual fund statement process.  
- Plan, arrange, schedule, and support a variety of virtual and in-person meetings and special events. This includes drafting agendas, taking and preparing detailed minutes and notes, interacting with committee volunteers, preparing and editing
correspondence, reports, memos, and setting up visual presentations and special events.

- Provide back-up assistance to receptionist to answer phone calls, assist visitors, open/close the office, and provide office coordination assistance as needed.
- Support Donor Services & Gift Planning and Finance staff with a full range of professional service and support related to the Foundation’s strategic direction and mission.

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

- A Minimum of three years of combined experience with project coordination, nonprofit development, database management, administrative support experience or a related field is required.
- Proficient use of Office 365, including Word, Excel, Outlook, PowerPoint, and Teams, and virtual meeting platforms such as Zoom.
- Proficient with project coordination.
- Experience working with a CRM software systems and relational databases, such as Blackbaud or Foundant. Raiser’s Edge, Financial Edge, and GrantEdge experience a plus.
- Preferred experience working in a hybrid virtual/in office work environment.

KNOWLEDGE, SKILLS AND ABILITIES

- Excellent written and verbal communication skills.
- Exceptional customer service skills.
- Manage multiple, and often changing, daily tasks and priorities in a fast-paced team environment.
- Willingness and enthusiasm to learn and contribute.
- Ability to engage and interact with internal teams to resolve issues timely and accurately.
- Effective time management to handle multiple concurrent projects and deadlines.
- Continuous improvement skills for process efficiency.
- Excellent organizational skills and keen attention to detail.
- Able to handle sensitive and confidential information and maintain a high level of confidentiality.
- Ability to work independently with minimal supervision.
- Able to demonstrate teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.

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.