Flourish with us!

We’re hiring a Donor Services & Gift Planning 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 gift planning, donor service and scholarship responsibilities:

- Organization and workflow associated with opening new funds, organizing fund documentation and changes, closing funds, and tracking prospective donors. This includes drafting, editing, and updating fund agreements and addendums, as well as related database work.
- Planning, workflow and communication of grant cycles and reports, supporting organizations and geographic affiliates.
• Coordination of scholarship program; working with guidance counselors, students, and community volunteers to ensure efficient and timely administration of the annual scholarship cycle.

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.
• 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 & Gift Planning Coordinator Position.
POSITION TITLE: Donor Services & Gift Planning Coordinator  
DEPARTMENT: Donor Services & Gift Planning  
LOCATION: Community Foundation for the Fox Valley Region 4455 W. Lawrence St.  
Appleton, WI 54914  
REPORTING TO: Director of 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 & Gift Planning Coordinator is part of the Foundation’s 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 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 & Gift Planning Coordinator is responsible for providing coordination and project management to support Foundation staff and assist prospective and existing donors, professional advisors, nonprofit organization representatives, and other Foundation departments and audiences. The Director of Gift Planning 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  
- Provide planning and coordination to support gift planning and donor services work with prospective donors, fund contacts, donor recommended granting and receiving gifts.  
- Responsible for organization and workflow associated with opening new funds, organizing fund documentation and changes, closing funds, and tracking prospective donors. This includes drafting, editing, and updating fund agreements and addendums, as well as related database work.  
- Enter and track status of bequests, donors’ charitable gift annuities, members of the Foundation’s Himebaugh Legacy Circle, and Friends of the Foundation appeals.  
- Coordination of scholarship program; working with guidance counselors, students, and community volunteers to ensure efficient and timely administration of the annual scholarship cycle.  
- Research prospective donors and nonprofit organizations, including preparation and support for staff with scheduled meetings.  
- Extract and format mailing and eblast list from the Foundation’s database and execute mail merges.  
- Responsible for organization and workflow of grant cycles, supporting organizations and geographic affiliates. Including, but not limited to, managing Spectrum (online grant application software), donor database records, and grant reports.  
- Work with staff leads to provide support for geographic affiliate foundations and supporting organization boards. Including but not limited to, organizing and scheduling appointments, planning meetings, taking minutes, and preparing and modifying documents such as correspondence, reports, memos, and email blasts.
• Generate data and database-driven reports supporting the development and stewardship efforts of the Foundation.
• Enter and maintain information about potential donors, professional advisors, and planned gifts into the Foundation database; generate database-driven reports highlighting donor and advisor activity.
• Provide support for grant committee reviewers and application reviews within the grant database.
• Provide support to the Foundation’s scholarship program, including but not limited to creating and updating applications in Spectrum, processing materials from students, coordinating volunteer committees and assisting donors and students.
• Assemble informational packets; prepare presentations, save, store, and file notes from meetings and other contacts as required; coordinate content-specific communications.
• Create and compile documents for a variety of committees and across all areas of the Foundation.
• Execute database related projects such as clean-up work, updating constituent related coding.
• Plan and coordinate Donor Services & Gift Planning and scholarship program meetings and event details.
• Provide back-up assistance to Community Engagement Administrative Associate to answer phone calls, assist visitors, open/close the office, and provide office coordination assistance as needed.
• Provide 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.