



Donor Services Officer

Community Foundation Santa Cruz County

Since 1982, Community Foundation Santa Cruz County has brought together people, ideas, and resources to inspire philanthropy and accomplish great things. The Community Foundation partners with community members, nonprofits, businesses, and local government to invest in the health, safety, and enrichment of our community. The Foundation manages more than \$145 million in charitable assets, and provides customized and tax-smart giving solutions that resulted in more than \$12.5 million in grants in 2019. Since 1982, over \$100 million in grants and scholarships have been awarded locally.

The Community Foundation seeks to make Santa Cruz County thrive for all who call it home, now and in the future. We are guided by values that drive our actions:

- **Solutions:** We support effective programs that address community issues and enrich the lives of Santa Cruz County residents.
- **Trust:** We earn trust through integrity, accountability, discretion, transparency, prudence, and extraordinary service.
- **Opportunity:** We leverage our resources toward a future that is just, equitable, and inclusive of our diverse community.

In 2019, we adopted four priority strategies for 2019-2020

- Build awareness to increase engagement
- Earn loyal customers by listening, responding, and providing exceptional service
- Continually improve operational efficiency
- Collaborate to maximize impact

The Donor Services Officer

Community Foundation Santa Cruz County seeks an experienced professional to serve as Donor Services Officer who will support donors in creating funds for giving now and planning for giving in the future. The Donor Services Officers will help donors learn about effective nonprofits and plan charitable gifts for the future. The Officer will help current and prospective donors to learn about tax wise giving options and how their giving can accelerate solutions to our county's most pressing issues. The Donor Services Officer establishes funds (e.g. donor advised, scholarship and nonprofit stewardship funds) while growing endowed funds and establishes memoranda of charitable of intent (MOCIs) for the future of the county. The Donor Services Officer will report to the Director of Philanthropic Services.

Duties/Responsibilities

Support Donors to Create Funds and Gifts that Best Meet Current Charitable Giving Intentions

We want our work with donors to be knowledgeable, warm, welcoming, inclusive and focused on our core values of accelerating solutions, building trust and advancing opportunity. In collaboration with the Foundation leadership, be responsible for supporting new donors to create fund agreements that best reflect charitable intentions. The Officer is responsible for supporting the donor through the fund agreement process, including donor meetings,

drafts, correspondence, edits, maintenance and filing of completed agreements. The Officer also maintains fund agreement templates and seeks ways to continually improve and make the processes more donor friendly. The Officer leads the Foundations annual Friends of the Foundation Campaign and is responsible for building Foundation grant making funds and meeting with prospective donors. The Officer stays abreast of changes in tax laws that affect donors in order to preserve the tax-deductibility of their gifts.

Establish Memoranda of Charitable Giving Intent for Future Giving Plans of Current and Prospective Donors

The Donor Services Officer has the opportunity to identify and work with prospective and current donors to plan their charitable gifts. The Officer will develop meaningful relationships with donors and make plans through their wills, trusts and beneficiary designations. This is an ongoing relationship and the Officer meets on a regular basis to make sure the plans continually reflect the donors' wishes. The Officer is responsible for Memorandum of Charitable Intent processes, including donor meetings, drafts, updates, correspondence, and document retention.

Recognize and Support Donors through Ongoing Contact, Events and Experiences

The Foundation values relationships based on trust and charitable intention. The Officer maintains positive relationships with prospective and existing donors. The Officer is responsible for developing and implementing a donor touchpoints plan that includes providing education opportunities, leading events, connecting and informing donors about nonprofits and responding to donor requests, including documenting donor contacts and information. The Officer oversees donor recognition through donor events, personalized thank yous, creating published lists, and coordinating special opportunities for direct contact. Leads development of donor education seminars and coordinates with Communications Officer and Philanthropic Services Director in planning, implementation and outreach for donor education program. The Officer collaborates with the Communications Officer and Philanthropic Services Director on the timing and content of communications to donors, particularly in the final quarter of the year.

Collaborate with Estate Planning Attorneys, CPAs and Financial Advisors to Support Giving.

The Foundation works closely with professional advisors to help their clients with charitable giving. The Officer provides timely, warm, courteous professional support to referred clients and gives follow up as needed to professional advisors. The Officer supports Advisors in working closely with the Foundation.

Help Donor Advisors make Grants to Nonprofit Organizations

Donor Advisors at the Foundation make approximately 80% of our gifts to local nonprofits. The Officer collaborates with the Engagement and Impact Director in planning and implementing Foundation initiatives to engage donor advisors in timely funding opportunities. The Officer continually learns nonprofit needs and opportunities. The Officer helps develop communications materials and gives presentations about the Foundation, tax wise giving and its programs to community groups, donors, and prospects. The Officer oversees the donor-advised grantmaking process, including ensuring compliance with IRS regulations. The Officer ensures the level of anonymity desired by each Donor Advisor.

Supervise the Philanthropic Services Team

The Officer supervises administrative staff to ensure best in class customer service in gift processing, gift acknowledgments, donor advised grant recommendations, pledge

processes, quarterly fund statements, and finalizing fund agreements. The Officer leads the workflow planning process for the year and ensures its successful implementation. The Officer also leads the reporting and analysis of donor metrics and ensures the quality of information from which the metrics are drawn. The Officer will be familiar with technical aspects of gift and grant processing in order to ensure efficiency and to provide back up in high volume periods. The Officer identifies the administrative support needed for Philanthropic Services activities, including events and communications, and delegates tasks accordingly.

Knowledge, Skills and Abilities of the Ideal Candidate

The Foundation seeks a professional driven by customer service, community solutions and desire to apply their professional skills in service of current and future community needs. The ideal Donor Services Officer will:

- Build trust with donors, prospective donors, nonprofits, and professional advisors
- Be personable and able to relate to donors and nonprofits
- Show genuine Interest in donors' interests
- Attend to detail to complete fund agreements, MOCIs, scholarship and other funds
- Cultivate professional advisor relationships.
- Teach and have public speaking skills
- Know and/or can readily learn about charitable giving vehicles and planned giving
- Be caring, proactive, thoughtful, strategic and able to build the Foundation's future

The Candidate should be able to spotlight current issues, tax advantaged giving options, and the work of our grantees. Candidates should demonstrate a keen interest in and knowledge of current events, particularly in issues that the Foundation seeks to address. We seek candidates who can translate complex issues and tax code information into guidance that connects people to the Foundation. Best suited to this role are individuals who offer their considerable expertise with a service mindset and approach. Candidates must have a respect for the diversity of the communities and grantees with whom we work, and can demonstrate strong interpersonal and collaboration skills to establish effective and respectful working relationships across the Foundation, nonprofits, donors, and other stakeholders.

Key functional skills we seek

- Proven record of successful client facing services
- Highest level professional in confidential interactions
- Understanding of local issues and nonprofits
- Relationships with local donors
- Strong background in community engagement and the local nonprofit sector
- Demonstrated ability to synthesize and translate complex concepts into clear, compelling content
- Adept at absorbing and understanding new subjects quickly
- Excellent time, project management, and prioritization ability
- Enjoyment of teams and supervision
- Ability to make a case for philanthropy, tax wise charitable giving, and charitable giving tools
- Tech savvy and experienced with the MS suite, Constant Contact, EventBrite, and CRM functions
- Experience with relational databases and an aptitude for generating reports of aggregated data
- Ability to define and monitor key performance indicators

Important personal attributes for success

- Alignment with the Foundation's values and an orientation to community service
- Flexibility to shift and pivot as needed as a team member in an evolving position
- Ability to read and navigate situations and diverse audiences with respect
- Resilience, care and optimism
- Patience, humility and humor
- Discernment, excellent judgement
- Strong and caring listener with excellent relationship building skills
- Resourceful with strong problem-solving skills
- Ability to develop and document clear and manageable systems for internal processes
- Attention to detail and the tenacity to follow through to the successful completion of a task
- Committed to racial equity, experienced in lifting up voices of communities of color, and focused on building bridges with an emphasis on equity

CFSCC is an equal opportunity employer committed to involving and empowering people of all backgrounds. Bilingual (Spanish/English) candidates and people of color are encouraged to apply.

Timeline

Ideal start date is early August, 2020. Applications encouraged by July 6th, 2020

Submit resume and cover letter by email to Susan Farrar: sfarrar@cfsc.org

Start Date: Between August 1st-15th.

Compensation

- Excellent benefits and salary range of \$90,000-\$105,000 depending on experience