



## CFWC Donor Services Officer

**Reports to:** CFWC Executive Director

**Position Status:** Full-Time/ Exempt/ Permanent

**Location:** It is expected that the donor services officer works from The Community Foundation of Westmoreland County (CFWC) office in Greensburg, will meet regularly with donors in the community, and will travel to The Pittsburgh Foundation's office as needed.

**Hiring Salary Range:** \$58,000- \$65,000

### POSITION SUMMARY

The donor services officer is responsible for executing a donor services program to promote interaction with and recognition of fund holders (donors) at all levels and increase donors' connection to The Community Foundation of Westmoreland County (CFWC) and their commitment to growing their funds. The officer will be responsible for enhancing relationships with donors by gaining in-depth knowledge of their values, interests and financial capabilities; matching their philanthropic efforts with CFWC's programs; and increasing their gifts to new and existing funds. The officer will lead projects to form donor partnerships and create unique donor events and experiences. The officer will work with the Foundation's donor services team to develop a donor strategy specific to Westmoreland County to increase giving and planned gifts.

The ideal candidate will be personable, adept at connecting with donors, able to work independently and will be highly detail-oriented. The officer must be able to keep track of each individual relationship with donors, what their specific needs are, and identify opportunities to connect donor interests and needs to the Foundation's service and partnership opportunities. All interactions with donors must be carefully recorded in the database and the officer must monitor and report on progress towards annual goals and adjust course when needed.

The donor services officer will be familiar with planned giving strategies and will know how to integrate planned gifts into conversations with existing donors. The officer will also provide backup support to the development officer in Westmoreland County. The officer will be an integral part of the CFWC team and will provide general support for all activities associated with the Foundation. This position reports to the executive director of The Community Foundation of Westmoreland County with support provided by the Development and Donor Services (DDS) department at the Foundation.

### PRIMARY DUTIES AND RESPONSIBILITIES

- Manage and execute the current donor relations process, which includes making and coordinating phone calls, meetings, correspondence, site visits, seminars and surveys.

- Work with the executive director and director of donor services to establish annual goals, ensure goals are met through the development of a strong donor services and planned giving strategy, and regularly meet to monitor strategy and progress.
- Ensure any new donor receives an orientation within six months of establishing a fund and any existing donor receives an annual review as necessary.
- Conduct approximately 100 individual donor stewardship visits annually and provide appropriate follow up for these relationships.
- Educate donors on CFWC's initiatives and connect donors to Program staff when appropriate, such that consideration may be given to expanding donations and growing their funds in alignment with CFWC's goals as appropriate.
- Provide information to donors, as requested, to ensure that they are making educated grant-making decisions.
- Leverage the standard fund management practices of the Foundation to create agreements that are easily and consistently administered in accordance with the donor's intent.
- Keep detailed records of donor's interests, ages, family engagement and potential opportunities for growth.
- Develop, manage and participate in donor events to enhance relationships with donors or potential donors, such as Wish Book, educational workshops, site visits and donor appreciation events.
- Increase efforts in multi-generational giving to engage families in giving opportunities.
- Maintain a clear understanding of Foundation policies related to all funds, but particularly donor-advised, scholarship and agency endowment fund types.
- Regularly partner and communicate with the Foundation's DDS team to meet goals, problem solve and innovate and attend weekly DDS staff meetings and the Foundation staff meetings in person.
- Present to prospective donor or advisor groups, when assigned.
- Work with Center for Philanthropy at the Foundation to engage and educate donors.
- Provide back up support to development officer as needed.
- Manage a portfolio of scholarship funds, acting as liaison between donor and the Foundation back-office scholarship team and interface with scholarship constituents, such as high school guidance counselors, in administration of scholarships.
- Responsible for excellent client experience for both donor and committee members, as well as compliance with IRS regulations for scholarships.
- Provide staff support for advisory committees as assigned, represent the Foundation at special events and execute administrative or programmatic tasks as assigned by the executive director.
- Commit to learning the role of community foundations, CFWC processes and programming, and engaging in professional development and networking to continue professional growth.

## **KEY SKILLS AND ABILITIES**

- Proven ability to work successfully with diverse populations and demonstrated commitment to promote and enhance diversity, equity and inclusion.
- Commitment to the Foundation's values of accountability, collaboration, community, racial justice and trust.
- Exceptional customer service with an ability to respond and react appropriately and efficiently to service donors, grantees and community leaders.
- Excellent interpersonal and communication skills.
- High levels of accuracy, productivity and initiative are required.

- High degree of professionalism and the ability to work independently and solve problems.
- Understanding of planned giving and how it relates to fund-raising goals and engagement opportunities for donors.
- Experience developing and implementing project plans and executing them across a department.

## QUALIFICATIONS AND EXPERIENCE

- Bachelor's degree or equivalent experience and/or education.
- Requires minimum of five years professional experience in a donor relations or development position.
- Exceptional interpersonal, verbal and written communication skills and ability to establish effective relationships with donor.
- High degree of proficiency in Microsoft Office suite.
- Experience with development/sales contact systems.
- Ability to maintain confidentiality, work independently and participate fully as a team member.
- Flexibility in meeting changing demands.
- A passion for community involvement and philanthropy, an entrepreneurial spirit, a high level of personal and professional integrity and ethics.
- Genuine interest in Westmoreland County and a dedication to promoting the Foundation's mission.

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### TO APPLY

Interested candidates should submit resume and cover letter to [jobs@pghfdn.org](mailto:jobs@pghfdn.org) by Aug 28.

No phone calls please.

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COMMITTED TO DIVERSITY, EQUITY AND INCLUSION.

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## ABOUT THE PITTSBURGH FOUNDATION

**OUR MISSION:** The Pittsburgh Foundation, established in 1945, works to improve the quality of life in the Pittsburgh region by evaluating and addressing community issues, promoting responsible philanthropy and connecting donors to the critical needs of the community.

**OUR VALUES:** Since its founding in 1945, The Pittsburgh Foundation's values have been evident in the deep relationships its people have forged in the region. As new strategies are developed to improve quality of life for everyone, the staff has identified these values and pledged to follow them in the work. **Accountability:** We act with transparency and integrity, fulfilling our commitments and owning the outcomes of our decisions. **Collaboration:** We unite in our work together to increase impact in our community for the collective greater good. **Community:** We embrace the opportunity to learn from those we serve and those who serve us to help shape solutions. **Racial Justice:** We work to enact fundamental systemic changes by eliminating policies, laws, practices, attitudes and cultural messages that reinforce differential outcomes by race. **Trust:** We have faith in our communities and earn their confidence by demonstrating competency, honesty and positive intent.

The Community Foundation of Westmoreland County is an affiliate of The Pittsburgh Foundation.

Learn more at [www.pittsburghfoundation.org](http://www.pittsburghfoundation.org) and [www.cfwestmoreland.org](http://www.cfwestmoreland.org).