



HUMBOLDT AREA
FOUNDATION

Manager, Donor Relations
JOB DESCRIPTION
March 2021

Location:	Crescent City or Bayside, CA
Department:	Advancement & Philanthropic Innovation
Reports to:	Director of Donor Relations and Development
Time Commitment:	40 hours/week work; 8:30a-5:00p occasional evenings, weekends, overtime
Status:	Regular, Non-exempt
Market Wage:	\$26.42/hr
Hiring Wage:	\$21.12-23.77/hr depending on experience, plus health benefits, retirement benefits, paid holidays and sick time

About Humboldt Area Foundation

Humboldt Area Foundation (HAF) serves the residents of Humboldt, Trinity, Del Norte, and Curry counties by promoting and encouraging generosity, leadership, and inclusion to strengthen our communities. Through the generosity of local donors, HAF has awarded more than \$90 million in grants and scholarships since 1972. HAF, along with its affiliate Wild Rivers Community Foundation, focuses its grantmaking and program efforts on strengthening community capacity and transforming our communities' ability to solve problems and address the root causes of those problems. Long-standing programs of the foundation include the Native Cultures Fund and the Northern California Association of Nonprofits, and current initiatives include Building Healthy Communities -- a 10-year initiative focused on improving the health and wellbeing of Del Norte County and Tribal Lands -- and the Equity Alliance of the North Coast -- a collaborative effort to understand and improve racial and social equity through education, dialogue, and coaching opportunities.

Job Description Summary

The Manager, Donor Relations is an integral part of the Advancement and Philanthropic Innovation team working with the VP of Advancement and Philanthropic Innovation and the Director of Donor Relations and Development to build donor relationships and create and implement funds. Responsibilities focus on supporting cultivation of new donors, developing and managing donor engagement processes and procedures, ensuring effective set up and execution of fund agreements, planning and managing donor events, and managing donor data collection, entry and analysis. This position requires proactive customer service skills alongside

a deep understanding, or capacity to learn, the myriad of issues that underserved communities face in our region, and the ability to articulate those issues to donors while building and maintaining strong relationships. A successful person in this role has good interpersonal skills, a respectful attitude for the work of the foundation and our donor and grantees, and a demonstrated ability to work effectively as part of a team.

Job Duties

- In collaboration with the Director of Donor Relations & Development and VP of API, work with active and prospective donors and Legacy Society members to support charitable giving and fund development.
- Support donor relations through relationship and trust building. Be personable and able to relate to donors, and show genuine interest in donors' interests. Provide excellent in-person, phone and online customer service.
- Manage logistics for meetings with donors, professional advisors, and community members including scheduling, material and presentation preparation, sharing information, taking notes, room set up and clean up and all food and beverage needs. As needed, help facilitate meetings, place calls, and send written correspondence.
- Manage administration, stewardship and implementation of fund agreements, including working across teams to ensure the coordination and accuracy of all agreements and documentation, maintaining fund agreement templates and seeking ways to improve and make the processes more donor friendly, and monitoring and updating documents as needed to reflect current laws and policies.
- Manage fund descriptions and giving tools on the foundation's website.
- Coordinate with the Finance and Administration Team on the gift process, providing excellent internal and external customer service in gift processing, gift acknowledgement, quarterly fund statements and finalizing fund agreements.
- Manage all donor engagement activity through the use of the foundation's Raiser's Edge CRM. Maintain accurate archives of donor contact information and communications. Coordinate data entry and corrections to the database amongst the donor team. Utilize database to perform research and prepare for donor meetings, and to analyze donor data and share insights on past giving to inform current strategies. Ensure data integrity and quality of information from which data and metrics are drawn.
- Learn and utilize Crescendo software and other databases and analytical tools and reports to assist in the preparation of planned giving scenarios and documents for donors, and advise and guide donors and organizational decisions.
- Organize and manage all donor-related events, such as Legacy Society event, Victor Thomas Jacoby Award Ceremony, and New Fund event. Support other foundation events as needed.
- Research, share and recommend best practices and up to date legal changes in the areas of donor advised funds, planning giving, donor outreach and engagement, and donor data management.
- Support outreach and communications to donors in collaboration with the Marketing and Communications Director, including fundraising campaigns, marketing materials, annual donor yearbook, and social media posts. Work with the communications team to develop invitations and creative ways to recognize supporters and demonstrate the value of giving to and through the foundation. Ensure accuracy of publications including detailed oversight of donor information and personalized messages of gratitude.
- Manage donor engagement and recognition through creation and implementation of touchpoints such as donor events, creating published lists, sending personalized thank you's and gifts, and coordinating special opportunities for direct contact.
- Manage administrative procedures, practices and project management tools for the donor team. Provide administrative support to the Director of Donor Relations and

Development in the form of credit card reconciliation, budget management, invoices and billing, filing, scheduling, formatting and printing.

- Participate as a member of the Advancement & Philanthropic Innovation team, and member of all staff through active involvement in team and all staff meetings, events, and training.
- Understand and communicate community and nonprofit needs and opportunities, including collaboration with the Community Solutions Team on grant requests and leveraging needs. Perform effective collaboration with all Foundation teams and staff.
- Support professional advisor relationships and referral needs.
- Work with grantmaking to support management of Donor Advised Funds (DAFs), including presenting opportunities to donors for funding, engaging donors in the foundations strategic priorities, sharing information and updates from nonprofits with donors, and facilitating the process of sharing and implementing donor advised grant recommendations
- Work with grantmaking to support awarding scholarships, including appropriate donor involvement in criteria selection, award ceremonies, sharing information and updates, and meeting recipients
- Maintain knowledge of current bequest agreements, update agreements as necessary, track obituaries, and support new relationships with successors

Minimum Qualifications

- Three years of experience working in philanthropic services, development and/or donor engagement which has provided the individual with the knowledge, abilities, and skills listed below:

Knowledge, Skills, and Abilities

- Provide outstanding internal and external customer service including excellent listening skills, diplomacy, and sensitivity, while maintaining a high level of emotional intelligence and empathy
- Ability to learn, understand and maintain current best practices in philanthropic giving
- Ability to develop and document clear and manageable systems for internal processes
- Demonstrated commitment to racial, economic, and social justice including an ability to communicate effectively with a diverse population, establish and maintain working relationships with individuals from diverse backgrounds, and demonstrate respect for cross-cultural perspectives and experiences
- Commitment to promoting and encouraging generosity, leadership, and inclusion
- Ability to take initiative as well as to collaborate in problem-solving
- Organizes time wisely and prioritizes workloads to meet deadlines in a busy office environment; able to respond to shifting needs and priorities
- Maintains confidentiality and protects sensitive information in accordance with organizational standards; possesses sound judgment and offers solutions with the highest level of personal integrity and ethical standards
- Strong software and technology skills, including entering and managing data
- Excellent communication (written and verbal), presentation and listening skills for multiple and diverse audiences.
- Ability to manage multiple projects with specific deadlines while delivering high quality work.
- Performs work with a high level of accuracy and an eye for detail; is able to identify and correct mistakes in own work

- Experience with and comfort using office equipment such as computers, phones, printers, etc.
- Experience and comfort using the Microsoft Office suite (Word, Excel, Power Point, Outlook, etc.)
- Ability to work the hours required for this position, and is both punctual and reliable
- Possess a valid California driver's license and current auto insurance

Preferred Qualifications

- Experience with major gifts fundraising and fund development for a nonprofit or community foundation
- Experience using Crescendo software for planned giving
- Proficiency with CRM software, preferably Raiser's Edge RENXT
- Experience with discussing and addressing issues of diversity, equity and inclusion
- Knowledge of and experience/relationships within our four-county region and diverse communities

Physical & Mental Requirements of the Job

Work is primarily performed in office settings. Hand-eye coordination and fine motor skills are necessary to operate computers and various types of office machinery. All of the job functions listed above involve, to a greater or lesser degree, the following physical demands: close vision, clear speech and lifting of up to 15 pounds.

Humboldt Area Foundation is an equal opportunity employer and makes employment decisions on the basis of merit and without regard to race, religion, creed, color, age, sex, sexual orientation, gender identity, genetic information, national origin, religion, marital status, medical condition, disability, military service, pregnancy, childbirth and related medical conditions, or any other classification protected by federal, state, or local laws or ordinances. Applications submitted for this position do not constitute a promise of employment.

Humboldt Area Foundation (HAF) and our affiliates are committed to diversity throughout our programs, environment, and workforce. It is our mission to “promote and encourage generosity, leadership, and inclusion to strengthen our communities” and our belief that taking active and intentional steps to ensure equal employment opportunity and create a working environment that is welcoming to all, will foster diversity and promote excellence in our work. To effectively serve a growing diverse population we endeavor to hire and retain staff who are sensitive to and knowledgeable of the needs of the continually changing communities we serve.

Employee's Signature

Supervisor's Signature

Date: _____

Date: _____