



Job Description

Job Title:	Annual Giving Officer
Department:	Development and Mission Advancement
Reports To:	Vice President of Development and Mission Advancement
FLSA Status:	Exempt
Reviewed By:	Axiom HRS
Prepared Date:	1/19
Approved By:	President/Executive Director
Approved Date:	1/19

JOB SUMMARY: The Annual Giving Officer is the lead fundraiser and donor relationship manager for Coburn Place’s annual fund. The Officer represents the core values and mission of the organization.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

1. Follows fundraising methods, strategies, and processes which are ethical and based on best practices, industry trends, and in alignment with Coburn’s philosophy.
2. Implements departmental donor moves-management strategy.
3. Personally manages the portfolio account of annual fund donors (individuals, corporations, civic, faith-based) who provide the necessary operational support which keeps Coburn financially sustainable.
4. Prospects, cultivates, solicits, and stewards new and existing donors for financial contributions and pledges to the annual operating revenue budget (the Annual Fund). Implements strategies to upgrade gifts, retain donors, renew lapsed donors, and encourage recurring gifts.
5. Builds professional/ethical mission-based relationships and frequently communicates with donors including expressions of gratitude, recognition, condolences, congratulations, and appreciation that include mailings, letters, cards, small tokens, newsletters and reports. Suggests topics, stories, and donors to highlight to Communications Manager for material content.
6. Ensures that all collected financial gifts and donated in-kind items are turned in quickly to the Office and Inventory Manager so that they can be appropriately documented, processed and deposited or stored. Ensures that donation receipts are completed with accurate donor contact information.
7. Stays informed and engages donors in varying mechanisms of giving such as: donor-advised funds, company matches, stock, property, vehicle, items, trust, planned/legacy, tax credits, hosting fundraisers and house parties, among others.
8. Works in conjunction with other donor relationship managers on the team to inform and offer donors giving opportunities of interest and fit to the donor to ensure relationship management is authentic and focused on the donor first and foremost (ie an annual donor who is interested in a making campaign or initiative gift to Adopt and Apartment or to sponsor a table at Blue and Gold Breakfast; or an annual donor who would like their family or business to do a group volunteer project, etc).
9. Within the Development team, segments donors and prospects to appropriate relationship manager (Pres/ED, VP of Development, Annual Giving Officer, Planned & Campaign Giving Officer, Community Relations & Communications Manager, Volunteer Coordinator, Grants Program Manager) to ensure a moves-management cultivation strategy is implemented.
10. Works with VP of Development and Pres/ED who are assigned the combined top 15% donor (major donors) accounts including the portfolio of Board members (regardless of giving levels.)



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11. Determines with Pres/ED, VP Development, Grants Manager and VP Operations to designate if the donor relationship/gift should be managed within the Coburn's Grant Program (ie some corporate or individual foundation/advised gifts may be called "grants" by the donor but in actuality function as relationship-based gifts and are best relationship-managed by the Development Dept. while some corporate or individual foundation gifts which are highly regulated and/or with reporting and/or reimbursement requirements are typically better relationship-managed within the Grants Program).
12. Achieves fundraising goals (industry % rate-based for individual, corporate, civic, and faith-based) set by, and in conjunction with, the VP Development, the President/ED and the Board thru the annual budgeting process and campaign/initiative-giving design planning. Monitors goal performance and implements course correction strategies when warranted.
13. Engages members of the Development Committee and the Board of Directors into prospecting, cultivating, soliciting, and stewarding annual fund donors.
14. Attends and invites donors/prospects to attend hosted events and third party events (house parties, fundraisers, dine-outs, etc) to benefit Coburn.
15. Ensures donor feedback regarding Coburn's online giving tools is shared with the Data & Technology Manager to ensure tools are accessible, maintained, user-friendly, and functioning as planned.
16. Works with Data & Technology Manager to optimize use and maintenance of the Bloomerang database for prospects, gift recording, processing, relationship management, tracking, acknowledgement and reporting purposes, and to ensure accurate interpretation and evaluation of data.
17. Accurately and timely completes assignments and enters interactions into Bloomerang (donor database). Accurately and timely submits completed Engagement Reports on new donors/prospects to Data & Technology Manager for a new Bloomerang record to be created.
18. Attends events and gives giving-related presentations, as a representative of Coburn Place, to promote awareness and visibility, and to accept funds.
19. Participates in creating the annual department revenue and expense budget.
20. Identifying opportunities for volunteer and in-kind resources and shares leads with Volunteer Coordinator. Actively engages program volunteers by providing adequate supervision and job-related training. Maintains knowledge and awareness of volunteer policies and procedures.

SUPERVISORY RESPONSIBILITIES: Supervises assigned development volunteers and interns.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty according to the requirements of Coburn Place. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

COMPETENCIES:

Organization-related Competencies – To perform this job successfully, all employees of Coburn Place should demonstrate the following competencies;

Customer Service – Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.



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Teamwork – Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of Coburn Place above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.

Organizational Support – Follows policies and procedures; Completes administrative tasks correctly and on time; Supports Coburn Place's goals and values; Benefits Coburn Place through outside activities; Supports affirmative action and respects diversity.

Oral/Written Communication – Speaks clearly and persuasively in positive or negative situations; Lists and gets clarification; Responds well to questions; Demonstrates group presentation skills and participates in meetings; Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.

Job-related Competencies – To perform this job successfully, employees should demonstrate the following competencies;

Project Management - Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project team activities.

Drive and Commitment – Realizes results through anticipating work, overcoming challenges through perseverance and consistently meeting goals.

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

Cost Consciousness - Works within approved budget; Develops and implements cost saving measures; Contributes to profits and revenue; Conserves organizational resources.

EDUCATION and/or EXPERIENCE: Bachelor's Degree (B.A./B.S.) in philanthropic studies, fund development, public relations, or other related field; and five plus year's related experience and/or training; or equivalent combination of education and experience is required. Master's degree (M.A. /M.B.A.) is desired. Previous demonstrated fundraising experience in a non-for-profit environment where working with a Board of Directors was essential to the operations of the organization is required. A Certified Fund Raising Executive (CFRE) certificate or progress toward CRFE certification is preferred.

LANGUAGE SKILLS: Ability to read, analyze, and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints. Ability to write speeches and articles using original or innovative techniques or style. Ability to make effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors.

MATHEMATICAL SKILLS: Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.



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REASONING ABILITY: Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

CERTIFICATES, LICENSES, REGISTRATIONS: A valid Indiana driver's license and a satisfactory MVR is required for this position. CPR and First Aid certification are required and training in bloodborne pathogens and universal precautions is required. A clear DCS history, and clear criminal and sex offender background checks is required. E-Verify is required. A Certified Fund Raising Executive (CFRE) certificate or progress toward CRFE certification is preferred.

OTHER SKILLS AND ABILITIES: Computer software skills required include: Microsoft Outlook, Word, Excel, PowerPoint and Adobe. Ability to operate a printer, copy machine, scanner and other office equipment is desired. Incumbent must have the ability to adapt and conform to shifting priorities and demands and execute accordingly. In addition, this position requires a general understanding of grant writing and management. Paying close attention to detail is essential.

OTHER QUALIFICATIONS: Candidate must enjoy public speaking, have an engaging demeanor, and have the ability to write accurately, efficiently and effectively.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee frequently will stand; walk; and lift and/or move up to 25 pounds. The employee occasionally will climb or balance; stoop, kneel, crouch or crawl; and taste or smell.

Specific vision abilities required by this job include close vision (clear vision at 20 inches or less), distance vision (clear vision at 20 feet or more), color vision (ability to identify and distinguish colors), peripheral vision (ability to observe an area that can be seen up and down or to the left and right while eyes are fixed on a given point), depth perception (three-dimensional vision, ability to judge distances and spatial relationships), and the ability to adjust focus (ability to adjust the eye to bring an object into sharp focus).

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this job, the employee occasionally is exposed to working near moving mechanical parts, the risk of electrical shock, fumes or airborne particles, toxic or caustic chemicals and outdoor weather conditions when traveling away from the office for meetings, seminars, etc. The noise level in the work environment is usually moderate.



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This job description has been approved by all levels of management. Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

SIGNATURES:

Incumbent's Signature

Incumbent's Printed Name/Date

Executive Director's Signature

Executive Director's Printed Name/Date