

Position Description

Position Title: Major Gifts Coordinator	Salary Grade: B
Department: Philanthropy	Full Time/Non-Exempt
Supervisor: VP, Philanthropy	

POSITION SUMMARY:

Under the general direction and guidance of the V.P., Philanthropy, the Major Gifts Coordinator provides dedicated support to the V.P., Philanthropy, as well as the departmental and inter-departmental team supporting outcomes. Overall responsibilities include administrative functions to support a Moves Management system dedicated to the Major Gifts’ portfolio of Tocqueville Society donors, Leadership donors, and Grants, with responsibility for continuous improvement of Major Gifts’ processes and procedures.

ESSENTIAL FUNCTIONS:

- Monitors reporting needs and generates all Major Gifts reports in a timely manner
- Update donor information and data into Enterprise and CRM on an ongoing basis as well as maintain donor hard files
 - Manages donor related inquiries and development of external materials, e.g. donor accounts balance requests, etc.
 - Accurately update all coding, departmental goals, and projections into appropriate systems
 - Research, create, and update donor profiles annually
- Assist in setting strategies, customized donor recognition and stewardship of MG donors:
 - Manage touch point of custom “Thank You” letters for Tocqueville donors, Non-workplace Leadership donors, and Grants, on behalf of the entire Major Gifts team, including mail distribution
 - Manage Tocqueville donor requests sent to designated non-profit organizations
 - Track and record Moves Management Plan for each donor or granting agency
- Processes both unrestricted and designated gifts to ensure accuracy and proper application for each, including stock transfers, checks, credit card transactions, etc.
- Primary support for Philanthropy committees:
 - Coordinate logistics for meetings, take meeting minutes and support presentations
 - Proactively develop and generate all related meeting materials for ongoing committee projects and meetings
- Primary support for donor events and site visits
- Primary support to implement wealth-screening and relationship-mapping tools.
- Coordinate with Marketing team on invitations, online, donor gifts and events logistics as needed
- Supports the Philanthropy team and participates in strategic networking at UWSD donor events as needed
- Other duties as assigned

QUALIFICATIONS:

- Bachelor’s degree and/or related professional work experience required
- Should possess strong interpersonal, written, and verbal communication skills
- Must be able to exercise initiative, independent good judgment, flexibility, discretion, and solid decision making

- Should possess excellent project management skills and disciplined time management skills with strong accountability
- Must possess strong multitasking and prioritizing skills, with exemplary attention to detail
- Must be a quick learner with ability to learn new database systems and easily adapt to change
- Must have excellent relationship building skills, strong organization, and follow up skills.
- Must be able to successfully manage multiple priorities and demonstrate confidence working within a fast paced team environment
- Proficiency in Microsoft Office (Excel, Word, Outlook, and PowerPoint) is essential; experience using Microsoft CRM or comparable fundraising database software preferred

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 functions of the job.

- Frequent walking or standing is required.
- This person must be able to remain in a stationary position at the workstation 50% of the time and participate in meetings on and off-site 50% of the time
- This person must be able to utilize their own transportation for visits around the San Diego community 50% of the time.
- The person in this position needs to be able to move about inside the office to access file cabinets, office machinery, etc.
- Hands are regularly used to write, type, key and handle or feel small controls.
- The person in this position frequently communicates with Leadership, Staff and the Public. Must be able to exchange accurate information in these situations.
- Weights of up to 30 pounds occasionally lifted (carrying devices provided)

The statements herein are intended to describe the general nature and level of work being performed by the employee assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of incumbents.

Work Schedule:

Typical schedule is 8:00 a.m. to 4:30 p.m. Monday through Friday. However, flexibility is required due to nature of business. Schedule may be changed as needed, to include evenings, weekends and holidays.

Updated 01/2018