

DONOR SERVICES ASSOCIATE

Department: Donor Services & Administrative Support

Reports to: Director, Donor Services & Administrative Support

Position Summary

EBCF is embarking on a new direction in its relationships with more than 500 donors to align their giving with a deeper analysis and reflection about the structural root causes of the persistent and growing inequities in our region. The Donor Services & Administrative Support (DSAS) team collaborates with all internal and external partners with an emphasis on workflow management, providing excellence in grant making, donor services, compliance, and enabling the continued growth of EBCF.

The Donor Services Associate will be responsible for: (1) successfully supporting donors, fund holders, and the efficient execution of internal systems updates and maintenance; (2) coordinating and providing support for development and donor services; and (3) helping with events logistics for events that educate donors and bring together the community for *A Just East Bay*. This position is perfect for someone with a unique set of skills and social justice analysis or someone willing to quickly develop these skills. It combines attention to detail, exemplary customer service, passion for social justice education, flexibility, and the desire to be part of an awesome team. We are seeking a skilled professional who is excited about this new direction and the passion and experience to help make it all happen.

Goals of DSAS Team

- Improving the donor experience to result in closer relationships, a stronger network of supporters, and increased funding for *A Just East Bay*
- Smoothly implement and run successful events, in collaboration with other EBCF teams, especially Development, which is responsible for raising ~ \$30M of new money annually
- Strengthening internal processes, business practices, and cross-team collaborations to support EBCF's mission for *A Just East Bay* while also ensuring legal and financial compliance
- Grant making and Scholarship management which provides over \$60M annually

Essential Duties + Responsibilities

- **Fund Management & Customer Service:**
 - Draft and send donor and fund holder agreements, including the creation of database profiles
 - Prepare and send donor communications, regarding new fund creation, fund updates, gifts, grants, and financial statements
 - Provide excellent customer service, including promptly replying to queries and following up on administrative details
 - **Donor Services Support:**
 - Process gift contributions, special gifts, stocks, and others; work closely with the Development Data Manager and Finance Department to monitor and ensure the accuracy of gift and donor information entry
 - Produce all donor acknowledgement letters through CRM system and mail merge and collaborate
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- with Development and other colleagues to identify and generate special donor acknowledgments as needed
 - Perform other data input into the donor database, including name and address changes, and donor and prospect demographic information
 - Deliver quality customer service to various constituencies to include internal departments and external clients; as assigned, monitors helpdesk phone line and/or departmental email accounts and responds to inquiries promptly and professionally
 - Provide monthly reports on fundraising goals (tracking gifts to solicit and close, year-to-date totals, etc.); work with the Development team to identify needs for complex data, refine and articulate those needs, and work with the Development Data Manager and other departments to design and deliver effective reports
 - Collaborate with the Finance Department and perform research for audits as requested, maintain documentation to assure IRS compliance of supporting organizations, membership tracking of board of directors and officers, and other special projects
 - Coordinate and provide administrative support for giving circles such as the Race, Gender, and Human Rights Fund (RGHR) and Supporting Organizations such as the East Bay Foundation on Aging (EBFA). This includes, but is not limited to, scheduling meetings and events, taking meeting minutes, managing files and event calendars, communications with EBFA Board /RGHR Members, completing billing and expense reports, and serving as a liaison between the client and other EBCF departments
- **Events coordination:**
 - Assist in the design and implementation of Donor Development and Donor Services events such as donor and fund holder events, prospect gatherings, donor education sessions, and webinars
 - Drive events coordination by spearheading collaboration with Operations Team for events scheduling, set up, and breakdown
 - Collaborate with Development Team on producing and managing event invitation lists and attendee lists, including tracking RSVPs, responding to inquiries, and maintain registration during events
 - Work with Communications Team to send out invitations and event-specific collateral
 - Work with other EBCF staff, vendors, and volunteers on events logistics as needed
 - Represent EBCF professionally and with a sense of genuine warmth and hospitality at events
 - **Other:**
 - Assist Communications Department in maintaining EBCF website, producing department-wide collateral, and creating donation pages through PayPal
 - Undertake operational improvement initiatives, special assignments, and research projects identified by the Director of DSAS
 - Help the DSAS team keep the office organized with filing, clean up, and tidying up

Core Qualifications and Required Skills

- **Passion** for the mission of EBCF to advance *A Just East Bay*.
 - **At least 2+ years of office experience**, preferably in a philanthropic-related institution or nonprofit.
 - **Relationship building skills** with a wide range of people. Skilled and excited to build trust with people, listen, ask questions, responsive to feedback, and build authentic relationships around the issues they care about, and activating those interests towards social justice.
 - **Results-oriented:** Someone who gets it done, is determined, creative, and solutions-oriented.
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- **Capacity minded:** Someone who isn't afraid to ask for help, clarification, or to point out "red flags" when something may impinge on meeting deadlines.
- **Strong project management:** A strong track record of creating work plans, setting goals, measurable targets, balancing multiple tasks and projects, and meeting deadlines; strong administrative acumen and an excellent attention to detail. Adept at providing effective and timely progress updates.
- **Curiosity, creativity, and willingness to learn:** Desire to approach each day with curiosity, humor, integrity, compassion, and optimism; someone who appreciates, can learn from, and build on EBCF's rich history and tried and true models. Solicits and welcomes contributions from staff at all levels in the organization towards successfully building relationships with our donors and community members.
- **Excellent communication skills:** The ability to communicate in a timely manner in a remote work environment via phone and email, as well as with challenging conversations around class and race with people with wealth.
- **Team-player:** Happy to work with and learn from others. Have a 'low ego, high output' mindset. Highly collaborative, flexible, and open to shifting priorities and timelines, and an ability to identify new, creative solutions when challenges arise. Excited to build a stronger organization that operationalizes its new mission, vision, and values, internally and externally.
- **An openness, fluency, and comfort in talking about oppressions** such as racism, sexism, and classism, and an understanding of how their own experiences and background relate.
- **Bachelor's degree desired.**

Our ideal candidate would have...

- Strategic thinking skills with energy, and the ability to think big picture, while also appreciating the importance of how the day-to-day administrative support contributes to EBCF's mission.
- Knowledge of and relationships in the East Bay, particularly around philanthropy and its social justice landscape. Belief in the importance of organizing donors to become powerful participants and allies in local social justice movements.
- Knowledge of community foundations, private foundations, and nonprofit agencies.

About EBCF

Founded in 1928, The East Bay Community Foundation -- one of the oldest and largest community foundations in the United States -- is a leading resource for mobilizing financial and leadership resources to transform East Bay communities. By leveraging its own philanthropic resources and position with those of the private, public, and non-profit sectors, EBCF is a critical force for change in the dynamically changing region by committing to advancing *A Just East Bay*. Learn more about the East Bay Community Foundation at <http://www.ebcf.org>.

Location: Oakland, CA

Start Timeframe: April or May 2020

Compensation: Position offers competitive compensation with the market and expectations of this position. Excellent benefits in line with the field of philanthropy.

We know there are great candidates who won't fit everything we've described above, or who have important skills we haven't thought of. If that's you, don't hesitate to apply and tell us about yourself.

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Deadline to Apply: March 13, 2020, 5:00pm

Please submit a cover letter, resume, and three references to jobs@eastbaycf.org and list **Donor Services Associate Application** in the subject line. Any application without all three requirements will not be considered.

The East Bay Community Foundation does not discriminate in employment opportunities or practices on the basis of race, ethnicity, religion, national origin, age, sex, sexual orientation, marital status, disability, or any other characteristic protected by law and is an employment-at-will company. EBCF is an equal-opportunity employer. People of diverse backgrounds are strongly encouraged to apply.
