



CHARITABLE GIVING ASSOCIATE

JOB DESCRIPTION & POSTING

POSTED: 1/21/2022

OVERVIEW OF IECF

The Inland Empire Community Foundation (IECF) is the Inland Empire's largest and only nationally-certified community foundation, serving a growing, diverse, and vast region of communities and thousands of donors. IECF has served the region for 80 years- and holds over \$120 million in donor and agency funds directed to causes that benefit the region. Over the last three years, IECF has emerged as a leading anchor organization, driving funding and strategy for a more resilient and collaborative region. From leading California's investments for Census 2020, to adopting a lens of equity for its work, IECF is on a mission to build the most effective community foundation possible to benefit the Inland Empire.

JOB SUMMARY

Reports to: SVP Charitable Giving
Status: Full-time hourly

Position Summary

The Charitable Giving Associate (CGA) provides administrative and logistical support for all aspects of Inland Empire Community Foundation's (IECF) asset development, community leadership, and donor relationships including: prospect identification and tracking, donor acknowledgement, communications, relationship building and cultivation, fund acquisition, donor events and professional advisor outreach, communication and events. The CGA will report to the Senior Vice President of Charitable Giving (SVP) and will support the SVP, the Regional Charitable Giving Officers (GO), and the Director of Planned Giving. (DPG). This group collectively is known as the Charitable Giving Team (CGT).

The CGA is also a key resource for IECF's database management (C-Suite) and internal processes for fund creation.

Duties

Asset Development

- Assist as needed with the active portfolios of each of the Charitable Giving professional staff with their assigned donors, agencies, and prospects
- Understand the different gifting products offered to donors by IECF, such as:
 - Donor Advised Funds
 - Designated Funds
 - Field of Interest Funds
 - Scholarship Funds
 - Agency Funds
 - Deferred Gifts (Planned Giving)

- With CGT, review current donor fund base to help determine those donors who might have the capability to expand their current fund(s) at IECF
- Assist in reviewing the current database for accuracy and update on a regular basis
- Responsible for cash receipts log; updating and/or creating donor profiles; and sending cash receipt log to the CGT on a weekly basis
- Assist with department events as required for potential donors, current fund holders, professional advisors, others as identified
- Complete other activities as directed by the SVP in relation to growing the asset base
- Send weekly reminders to CST to update and enter all contacts in C-SUITE and resulting reports
- Attend all meetings of the CGT. Provide administrative support, i.e. minutes with action items, scheduling appointments with current and prospective fund-holders, and agencies as requested
- Maintain and organize collateral/donor materials
- Responsible for Fund Anniversary Cards; creating the monthly list, getting signatures from appropriate staff and mailing cards out

Donor Relationships and Services

- With senior staff, assist in the ongoing development and maintenance of the annual master donor prospecting list for status and high-level reporting for staff and board
- Help ensure process is in place for open and ongoing communication with our fund holders, keeping them updated on IECF donor related and community leadership activities
- Generate formal gift acknowledgment letters for the appropriate signatory (SVP, CEO, GO, and/or Board Chair) on a timely basis
- Assist with the design and implementation of donor development, donor services, donor and prospect receptions, and ambassador-related events that may involve board members, professional advisors and other volunteers who advance asset development goals
- Support the planning, implementation, and interaction of the *Brouse Legacy Society*, which include recognition programs; expansion of the program and membership; and receptions; and communications

- Stay current on trends germane to the management of C-SUITE database and knowledge on the use of the *Crescendo Planned Giving* product line
- Manage the report and data output functions of C-SUITE along with the preparation and dissemination of C-SUITE lists for various publications, events and other special needs with accuracy and in a timely manner

Community Leadership

- When appropriate, provide administrative support to the charitable giving activities of IECF initiatives and programs

Research and Support

- Develop a comprehensive understanding of C-SUITE and its use in donor cultivation and gathering of historical background
- With senior staff, develop a system of information gathering and retrieval and act as the main conduit of that activity to better inform the board and others
- Provide the SVP, GO, DPG with research for potential and current clients as requested
- Work in coordination with Marketing/Communications Department on all communications, media and marketing materials for mailing/email blasts

Duties Otherwise Assigned

As determined by the SVP, and the CG Department, in coordination with, the President and CEO, projects may be assigned on an as-needed.

KEY RESPONSIBILTIES

- Administrative and Event Support
- Database Management
- Gift Management

QUALIFICATIONS

Knowledge & Skills: Describe the minimum proficiencies, technical skills, training, education and/or experience required to perform this job competently.

Education Level/Experience: Bachelor's degree preferred AND 2 Years of Experience

Field of Study/Area of Experience: Experience in not-for-profit development/charitable giving

Other Training/Technical Skills/Knowledge:

- High level of proficiency in Microsoft Word, Excel and PowerPoint
- Database management experience – C-Suite or equivalent Database/CRM preferred

COMPENSATION

Compensation will be commensurate with skill level and experience with an annual performance and salary review; anticipated hiring salary range for this position is \$45,000-\$47,000 based on proven experience meeting the qualifications in this job description.

EEO STATEMENT

Inland Empire Community Foundation is an equal opportunity employer and makes employment decisions on the basis of merit. The company will not discriminate on the basis of race, religion (including religious dress and grooming practices), color, sex (including pregnancy, childbirth, breastfeeding and/or related medical conditions), sexual orientation, national origin (including language use restrictions), ancestry, citizenship status, uniformed service member or veteran status, marital status, age, medical condition (genetic characteristics, cancer related), physical or mental disability (including HIV and AIDS), gender, gender identity, or gender expression. It also includes a perception that anyone may have any of those characteristics or is associated with a person who has or is perceived as having any of those characteristics. All such discrimination is unlawful.

HOW TO APPLY

Please send a cover letter outlining your fit and passion for the job of Charitable Giving Associate along with a resume to Kim Potter at Kpotter@iegives.org. The position will remain open until a successful candidate is found and hired. Please check our website to determine if the posting is still open at iegives.org/about/iecf-overview/#job-opportunities. For questions, contact **Kim Potter, Executive Assistant/Office Manager** at Kpotter@iegives.org.

To learn more about the Inland Empire Community Foundation, please go to www.iegives.org.