

Inland Empire Community Foundation (IECF)

Strengthening the Inland Empire through Philanthropy

Regional Charitable Giving Officer Coachella Valley (CV) .60 FTE

JOB DESCRIPTION

Reports to: Senior Vice President of Charitable Giving

Status: Salary, non-exempt

Position Summary

This position leads asset development/fundraising, donor identification and cultivation and stewardship efforts with a focus on building the Culture of Philanthropy in the Greater Coachella Valley. The person in this position will increase awareness and charitable giving to the Inland Empire Community Foundation, its programs, initiatives, and philanthropic efforts. The Regional Charitable Giving Officer Coachella Valley coordinates with Senior Vice President of Charitable Giving in the development of a comprehensive asset development plan to meet established fundraising goals and growth strategies for the region and organization.

Duties

- Develop a portfolio of at least 50 to 100+ active and/or prospective donors to be cultivated for new and ongoing gifts to meet established asset development goals and for future asset growth through cultivation meetings (Goal of at least two unique donor visits per week).
- Rank and rate identified donors to determine best method to contact these individuals; through both face-to-face visits (goal above) as well as planned IECF or other nonprofit receptions.
- Create a calendared weekly and monthly plan for visits and/or contacts with donors and other top prospects to meet outreach goals of 2 meetings per week (either in person or via Zoom), with specific metrics tied to each.
- Coordinate with Senior Vice President of Charitable Giving to support Agency endowment fund holders via the planning and implementation of planned giving support to build their endowment fund in partnership with Planned Giving Officer.

- In partnership with Senior Vice President of Charitable Giving, identify and reach out to past Foundation Board of Director (Emeritus) and Committee members to request guidance, input and involvement in the identification of key individuals and families (High-Net worth) as prospective donors or fund holders.
- Develop a plan to inform and educate current and prospective donors on the different or varied charitable giving tools or options available: 80th Signature Funds, Donor Advised Funds; Charitable Gift Annuities; Charitable Remainder Trusts, IRA Rollover, Life Insurance and Retirement Benefits, through IECF.
- Learn about the Foundation's Donor data base, CSuite, its use in donor cultivation and fund development.
- Ensure all contacts, communications, and key socioeconomic data regarding donors, nonprofits (current and prospects), key constituents, and other important contacts are entered into CSuite, including completing assigned meeting tasks by documenting dates completed and notes for these meetings to substantiate meeting activity goal of 100 meetings per year.
- Develop a comprehensive database of new donor prospects to include: High Net Worth Individuals (HNWI) and families; Nonprofit organizations; Business or corporate entities; Professional Advisors (estate planning attorneys, CPAs, bank and trust officers, wealth managers, financial advisors, CFPs, real estate and insurance professionals); family foundations; and other individuals and entities external to the region who have links to the area and may have the potential or interest in establishing a fund or financially support the Foundation using an submitting to the Charitable Giving Associate via the Donor Profile Form.

Professional Advisors

- Review and become familiar with current and past Professional Advisors who have been engaged with the Foundation within the Coachella Valley region.
- Create a calendared weekly and monthly plan to meet, inform and cultivate current and prospective Professional Advisors for possible client referrals to IECF.
- Plan, promote, implement and obtain sponsorship funds for a Professional Advisor Council (PAC) meeting in the Greater Coachella Valley.
- Stay current with trends in fund development, donor cultivation and relationship building, major and planned giving, estate planning, and new tax laws.
- Maintain IECFs' visibility in the Professional Advisor community by attending programs, events that enhance understanding of fund development, major gifts and planned giving with this key audience.

Marketing

- Coordinate with Marketing/Communications staff all marketing and communications strategies targeted to key audiences in the region.

Community Leadership

- Lead efforts to increase awareness and obtain funds for IECF's programs: 80th Signature Funds, Youth Grantmakers-Coachella Valley; Graduate Success and the Coachella Valley Fund as well as others that are developed over time.
- Engage with organizations, activities, and events in the community which will enhance the overall standing of IECF with community leaders and key constituents.
- Interact at a variety of levels of municipal and regional governance as determined to be of value to IECF.

Management and Administration

- Provide monthly reports on activities via weekly Csuite updates via tasks, notes and overall database management of information for both current and prospective members through the donor profile form.
- Attend all IECF Staff and Charitable Giving Department meetings.

Duties Otherwise Assigned

As determined by Senior Vice President of Charitable Giving, projects may be assigned on an as-needed basis.

JOB DESCRIPTION ACKNOWLEDGEMENT

I have received a copy of the job description for my position:

Position: _____

Revision Date: _____

I have reviewed this job description and I understand all my job duties and responsibilities. I am able to perform the essential functions as outlined. I understand that my job may change on a temporary or regular basis according to the needs of my location or department without it being specifically included in the job description. If I have any questions about job duties not specified on this description that I am asked to perform, I should discuss them with my immediate supervisor or a member of the Human Resources staff.

I further understand that future performance evaluations and merit increases to my pay are based on my ability to perform the duties and responsibilities outlined in this job description to the satisfaction of my immediate supervisor. I have discussed any questions I may have had about this job description prior to signing this form.

Employee Name _____ Date _____

Employee Signature _____