



## **Donor Relations Coordinator**

**Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.**

**In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. You will also actively play a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.**

### **SUMMARY**

The Donor Relations Coordinator is a new position that will develop, manage, and implement the donor relations strategy for donors who give generously to Filoli. The Donor Relations Coordinator provides a wide variety of skilled support for the development program as well as senior staff and the Board of Directors.

This position reports to the Chief Development Officer (CDO), and works closely with the Chief Executive Officer (CEO), Chief External Relations Officer (CERO), the Development Committee, the Development team, and the External Relations team.

This position interacts with members and donors and has access to confidential information requiring considerable use of tact, diplomacy, discretion and judgment. Responsibilities include project management, event planning, documentation management, and data reporting.

This is a full-time (defined as 30-40 hours per week, flexibly scheduled), non-exempt and hourly position. Depending on candidate experience, the salary range is \$35.00 - \$40.00 per hour. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. The schedule will be based on business needs and flexibility will be important.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:**

### **Donor Stewardship**

The Donor Relations Coordinator serves as the primary point of contact for donor relations engagement activities involving major donors including project specific restricted funds, including events, impact reporting, fund and data management, and special recognition projects.

- Partner with CDO to create and implement customized stewardship plans for donors who give generously to Filoli;
- Identify, cultivate, and steward donors and prospects with the goal of building a robust major gift pipeline;
- Proactively monitor and manage the donor relations needs of donors;
- Establish and maintain strong partnerships with Filoli leadership in order to maximize engagement for their portfolios of donors;
- Ensure benefit fulfillment for major donors;
- Build complete understanding of each donor's involvement and giving activity;
- Assess donor relations opportunities and track donor relations trends;
- Recommend donor relations improvements based on findings.

### **Event Planning**

The Donor Relations Coordinator leads Filoli's fundraising and cultivation events. Responsibilities include planning, guest list management, registration, and event execution.

- Assist CEO & CDO for Gala in the Garden planning and project management, Filoli's annual signature fundraising event;
- Serve as project lead for Holidays Opening Night dinner, Filoli's official start of *Holidays at Filoli* season;
- Manage department partners, vendors and key relationships for all development events;
- Solicit and manage in-kind donations;
- Coordinate event set-up, rentals, and catering needs with the Events team;
- Coordinate advertising and publicity efforts with External Relations team for Gala in the Garden and other development events;
- Plan and host other seasonal cultivation events, as needed.

### **Annual Fund Project Management**

With support and direction from the CDO, and partnering with the External Relations team, the Donor Relations Coordinator serves as project lead for Filoli's Annual Fund program.

- Plan, develop and execute segmented mailed and electronic seasonal fundraising solicitations to Filoli membership;
- Oversee mail house, printer, and other vendors;
- Coordinate seasonal marketing plan including website, newsletters, social media and email communications;
- Assist with gift processing and acknowledgments;
- Report and analyze results to internal stakeholders;

### **Development Administration**

- Serve as a member of the Development Committee as minutes recorder. Oversee meeting planning and event set-up including room, food, AV and other needs;
- Oversee major gifts database management with assistance from the External Relations team working regularly with confidential information and ensure its security;
- Research, draft, and manage high-profile biographies, briefing materials, talking points, and other related materials;
- Execute fiduciary responsibility to ensure that gifts are awarded and utilized in accordance with donor expectations and organizational policy in a timely manner;
- Distribute reports utilizing a variety of mediums, including print, email, and other digital reporting tools;
- Serve as primary back-up for gift processing and membership functions;
- Oversee the Requests for Donations program supporting local non-profit organizations' fundraising activities;
- Provide general office management support including ordering and maintaining supplies, copier/printer and mail systems;
- Develop tracking methods for reporting of the team's overall productivity
- Serve as a member of the staff editorial review ad-hoc committee;

### **General**

- Provide welcoming and helpful service to staff, volunteers, members, Board Members, donors and the public – whether in-person or on the phone;
- Support Filoli's diversity, equity, accessibility and inclusivity efforts and ensure the equitable treatment of all donors;

- Work a flexible schedule based on the needs of the organization and be available to dependably see projects through to completion;
- Uphold all Filoli's policies, procedures, guidelines and standards;
- Maintain flexibility and perform other duties as assigned to respond to the needs of the organization, including running errands in support of events, meetings and projects;
- Attendance and punctuality are essential to work and all work-related functions;
- Filoli employees may also perform other duties as assigned.

### **SUPERVISORY RESPONSIBILITIES**

This position will occasionally supervise interns or event volunteers.

### **MINIMUM QUALIFICATIONS**

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

#### **Education and/or Experience:**

Bachelor's degree with direct experience in fundraising or similar personal service industry preferred.

#### **Core Competencies:**

- **DEVELOPMENT ADMINISTRATION EXPERIENCE** – Three years working in an administrative role. Previous experience working in nonprofit development desired.
- **PEOPLE, PROJECT, AND PROGRAM SKILLS** – Provide excellent planning and project management skills. Effective cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires.
- **LEADERSHIP** – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively and build partnerships with Filoli's many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **CULTURAL COMPETENCIES** – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- **DIVERSITY, EQUITY, AND INCLUSION** – Committed to Filoli's dedication to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.
- **COMMUNICATION SKILLS** – Demonstrate excellent written and verbal communication skills. Communicate (listening and speaking) effectively with donors, vendors and employees of the organization. Confidence in handling both face-to-face and telephone interactions with donors.

- **DECISIVE NATURE** – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions with understanding of the inherent risks and the implications of decisions.
- **COMPUTER SKILLS** – Strong Proficiency and knowledge of Microsoft Excel, Word, PowerPoint, Outlook and Google Applications. Experience and proficiency working with a donor database (Altru or similar product).
- **AVAILABILITY** – Maintain a flexible work schedule that may include evenings and weekends to meet the demands of executive management.

**Skills and Abilities:**

- Demonstrate a strong customer service orientation;
- Work independently while maintaining open and transparent communications about duties and project status, within the bounds of the area of responsibility and authority;
- Demonstrate consistent and exceptional attention to detail, resourcefulness and an ability to think through an issue and anticipate possible problems, obstacles, and conflicts;
- Be organized and follow through on tasks to a successful completion;
- Display impeccable discretion, confidentiality, judgment, graciousness and flexibility at all times;
- Take direction, multi-task and work in an environment of regular interruptions;
- Work and communicate successfully with a highly diverse population of staff, volunteers, members, Board Members, donors and the public;
- Serve as a collaborative team member with strong interpersonal skills and a sense of humor;
- Read and interpret documents such as safety rules, operation and maintenance instructions and procedural manuals.

**CERTIFICATES, LICENSES, REGISTRATIONS**

A valid Driver’s License is required.

**PHYSICAL REQUIREMENTS**

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry items up to 20 pounds;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend frequently as well as sit for long periods at a computer.

**HOW TO APPLY**

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to: <https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

**Please visit our website for more information: [www.filoli.org](http://www.filoli.org)**

**Filoli is an equal opportunity employer who values diversity in the workplace.**