



Stewardship and Donor Engagement 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 2024-2028 Strategic Plan and Capital Campaign. 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

Reporting to the Development Manager, the Stewardship and Donor Engagement Coordinator will play a crucial role in developing and maintaining a community of engaged donors and volunteers.

Strong stewardship and exceptional donor experiences are at the heart of Filoli's fundraising strategy. As Filoli embarks on a major comprehensive campaign, the Stewardship and Donor Engagement Coordinator will play a key role in ensuring donors and leadership volunteers are connected to Filoli through meaningful touchpoints that recognize and demonstrate the impact of their philanthropy.

The Stewardship and Donor Engagement Coordinator will collaborate with the Development team as well as staff partners and volunteer leaders to execute personalized stewardship plans for major and principal-level donors while championing best practices and creating institutional resources for stewardship and engagement across all donor communities.

This position is full-time, non-exempt and hourly. Depending on candidate experience, the hourly rate range is \$36.00 to \$39.00. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. This position will have flexible scheduling including weekend/evening service as needed. The schedule will be based on business needs so flexibility will be important.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Stewardship and Donor Engagement (60%)

- In partnership with Chief Development Officer and Development Manager, ensure the effective implementation of a stewardship and donor engagement program aligned with industry best practices for donor relations, reporting, and recognition;
- Implement a stewardship framework for respective donor groups (Filoli Circle, annual fund, first-time, planned giving, etc.) and create deeper engagement opportunities for donors at all levels;
- Collaborate with Development staff and internal staff partners to develop and execute individualized stewardship and engagement plans for major and principal gift donors. Assist with donor and prospect engagement by creating tailored donor communications and collaborating with internal partners to facilitate event and engagement plans;
- Concierge service to donors related to donor inquiries and requests in a timely manner, triage requests efficiently to support the donor journey, organize stewardship meetings and tours, facilitating ticket requests, and greeting guests;
- Coordinate standard stewardship mailings such as holiday and birthday greetings and communications from the CEO, support the gift acknowledgement process by regularly updating thank-you messaging, and compose special donor correspondence, such as congratulatory and sympathy letters from Chief Executive Officer, Chief Development Officer, Board Chair, and other senior leaders;
- Oversee donor recognition listings, including in event program books, online, in annual reports, and on the semi-permanent donor wall;
- Serve as a Filoli ambassador and representative at internal and external meetings, events, and programs;

Reporting (25%)

- Coordinate the development and distribution of donor lists, impact reports, endowment reports, foundation and government reports, and other stewardship-related report deliverables, including preparing mailing lists and overseeing content creation, design, and production;
- In partnership with Filoli administration and the Finance department, ensure adherence to endowed fund accounting, reporting, and tracking policies and procedures;
- Manage the preparation of annual Donor Summary Statements for Board members and other top donors;

Data and Records Management (15%)

- Initiate and maintain gift agreement documentation. Ensure all gift agreements and stewardship plans are appropriately stored and accurately reflected in the donor database;
- Responsible for inputting specific engagement plan data, such as deliverables and biographical information/relationships, into the Altru database and producing reports that measure the efficacy of stewardship and donor engagement activity.

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, core competencies and skill requirements listed below:

Education: Bachelor's Degree required.

Core Competencies:

- **DONOR RELATIONS EXPERIENCE AND KNOWLEDGE** - A minimum of two years of donor relations experience in a comparable institution, program, or function. Working knowledge of databases, with experience in Blackbaud Altru or similar customer relationship management system (CRM) preferred. Knowledge and understanding of trends and best practices in the philanthropic sector.
- **PEOPLE**– Capacity to interact confidently and effectively with Filoli's many constituencies including staff, Board members, community partners, individual and institutional donors, and community supporters.

- COMMUNICATION – Exceptional oral and written communication skills including the demonstrated ability to research, and analyze information, compose reports and correspondence, and present data in a clear and inspiring manner.
- PROBLEM SOLVING– Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems.
- PROJECT AND PROGRAM MANAGEMENT – Possesses cross-functional collaborative capacity as well as a high level of organizational skill. Ability to lead projects and either take direction or work independently as the situation requires.
- 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 making tough decisions.
- CULTURAL– Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and worldviews. 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 an equitable organization. Demonstrate a passion for 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.
- COMPUTER SKILLS – Strong capacity for using donor databases. Proficiency with Google Suite and Microsoft Office applications.
- AVAILABILITY – Maintain a flexible work schedule that includes evenings and weekends to meet the demands of the role.

Skills and Abilities:

- Demonstrated experience building successful, productive, and collaborative relationships with colleagues and external constituents;
- Be an effective communicator who is articulate and persuasive in written and spoken communications -- adept at crafting donor correspondence and materials and making presentations to a variety of audiences;
- Display a high level of integrity and dependability with a strong sense of customer service, urgency, results-orientation, diplomacy, confidence and good humor;
- Demonstrate a deep commitment to and enthusiasm for the mission and vision of Filoli;
- Detail and results orientated with intentional use of data to improve performance and process information to make astute recommendations and/or decisions;
- Possess a strong connection and commitment to San Francisco, Peninsula, and Silicon Valley fundraising community;
- Ability to think strategically while executing tactically within a resource-constrained environment;
- Highly motivated and energetic, ability to show initiative and work independently;

- Ability to respectfully ask questions, challenge, and communicate both positive and difficult messages to subordinates, superiors, and peers; Speaks about issues truthfully and without blame;
- Sound judgment regarding the appropriateness of guarding confidentiality to protect the privacy rights of colleagues or donors;
- Ability to work in a fast-paced, change oriented environment;
- Follow-through to successful completion of all projects and communications.

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:

- Sit for long periods of time at a computer;
- Lift/carry items up to 25 pounds;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend.

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

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