



## Minneapolis Jewish Federation Mission

*We build community, care for the welfare of Jews everywhere and maximize participation in Jewish life*

## Position Identification

**Title: Coordinator of Donor Relations and Stewardship**

**Reports to: Chief Development Officer (CDO)**

**Status: FT, Exempt**

## Purpose

The Coordinator of Donor Relations and Stewardship works closely with the CDO and the Director of the Jewish Community Foundation to support positive donor relations by fielding questions, addressing concerns, and actively listening to our donors and fund holders. Extra attention is given to ensure enhanced customer service to our major donors and fund holders.

Donor and fund holder recognition is a key component of donor relations and this position is responsible for maintaining all donor and fund holder stewardship and recognition programs. This position is also responsible for creating and updating donor and fund holder profiles and records, and with assisting in prospect management assignments, including identifying new prospective (and increased) donors and fund holders.

The Coordinator of Donor Relations and Stewardship will also raise funds for the Jewish Community by developing relationships with donors and fund holders at the leadership giving level of \$1000-\$9,999 annually. This work includes-- securing gifts from individual donors, identifying and qualifying prospective donors and fund holders, and cultivating and stewarding current donors and fund holders. This position will also help connect donors' and fund holders' philanthropic goals with Federation and Jewish Community Foundation programs, as well as with community partners.

## Position Requirements

**EDUCATION:** Bachelor's Degree; or a combination of education and experience in a field closely related to Development

**EXPERIENCE:** 2-3 years of experience in customer relations/management and 1 – 3 years of experience in fundraising and volunteer management or related professional experience, knowledge of the Jewish community preferred.

**SCHEDULE FLEXIBILITY:** Able to work early mornings, evenings and weekends as required

**PHYSICAL REQUIREMENTS:** Able bodied – not easily fatigued – and well-groomed, well-spoken, and well-mannered



## Key Areas of Responsibility

### **Provide Excellent Customer Service for Minneapolis Jewish Federation Donors and Jewish Community Foundation Fund Holders**

- Serve as lead contact for certain donor and fund holders with the Federation and Jewish Community Foundation
- Manage donor and fund holder account issues
- Follow up with donors and fund holders who require assistance and/or problem resolution
- Provide donor and fund holder recaps and account analysis
- Manage write-offs, deletions and adjustments to pledges and fund disbursements
- Handle donor payments and fund holder grants and disbursement as needed
- Review all donor and fund holder statements
- Provide special handling of major gifts and large fund holder statements
- Manage process regarding unapplied campaign pledge payments

### **Manage and Implement Donor Recognition Processes**

- Assist in compilation and management of donor and funder holder recognition processes (including Roll of Honor and Legacy Society listings)
- Develop donor and fund holder recognition strategies and coordinate with the CDO and the Director of the Jewish Community Foundation on the sending of any acknowledgements to major donors/volunteers/key lay leaders
- Produce donor and fund holder acknowledgement letters
- Oversee process for pledge/gift entry and recognition for Annual Campaign, Directed/Restricted and Tribute gifts
- Monitor, update and maintain overall giving society and the It's Your Legacy program database lists
- Ensure proper entries of donor and fund holder information into CRM
- Create and maintain donor and fund holder prospect profiles for the Development Team.
- Assist with developing donor and fund holder cultivation and solicitation plans

### **Identifying, qualifying and building philanthropic relationships with donors capable of making leadership annual gifts of \$1,000 - \$9,999**

- Partner with the Development Officers and the Prospect Development team to identify, contact, and qualify individuals with the capacity to make campaign gifts at the leadership annual giving level.
- Conduct calls to qualify and assess new and lapsed donors with the financial capacity to make leadership annual gifts, and to secure personal visits and substantive contacts with these donors.
- Develop and cultivate approximately up to 50 actively managed donors at the leadership annual giving level.
- Develop and implement strategies for each prospect, including ways to increase involvement of donors and prospects in the activities of the Federation and the Jewish Community Foundation
- Meet defined visit and solicitation goals.
- Work closely with lay leaders, volunteers and other stakeholders to achieve the overall Federation and Jewish Community Foundation development goals.
- Complete and file timely contact reports. Maintain accurate and relevant records within the Federation donor management system.



- Attend Minneapolis Jewish Federation events and missions to create, cultivate, and maintain relationships with donors, and assist with event planning and execution when appropriate.

#### **Solicit Gifts**

- Execute moves/actions steps in collaboration with the Development Team.
- Solicit leadership annual gifts, including multi-year pledges.

#### **Training and Development Team Assistance**

- Participate in professional development and fundraising training programs.
- Assist Chief Development Officer, Director of Jewish Community Foundation and Development Officers
- Assume other responsibilities on the Development team as needed



## Organizational Responsibilities

- Uphold and exemplify the Minneapolis Jewish Federation's mission/vision
- Uphold and exemplify the leadership and or behavioral competencies of the organization (see attached)
- Exemplify customer service both internally and externally
- Attend Federation events as position requires
- Attend regularly scheduled staff meetings
- Other duties as deemed necessary to achieve organization/team goals

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**Employee**

**Date**

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**Minneapolis Jewish Federation Representative**

**Date**