

**The Relatives
Job Description**

Job Title: Philanthropy Officer
Department: Advancement - The Relatives
Reports To: Director of Philanthropy
FLSA Status: Exempt
Prepared By: Director of Philanthropy
Prepared Date: May 2026
Approved By: HR

SUMMARY:

The Philanthropy Officer strengthens and manages The Relatives’ donor pipeline by identifying, qualifying, and cultivating prospective supporters as part of the Advancement team. Working with the Director of Philanthropy and Major Gifts Officers, this role helps move annual donors toward multi-year and major giving opportunities. The Philanthropy Officer leads the annual fund strategy using the Benevon model, overseeing donor cultivation, solicitation, and related communications. The role collaborates with the Director of Communications, Volunteer Engagement Officer, and Donor Relations Associate to meet annual fund goals and ensure consistent engagement. The position also implements a comprehensive stewardship plan, including the annual report, appeals, and donor communications. All team members are responsible for maintaining accurate donor records and acknowledgements to ensure thoughtful and appropriate donor identification, cultivation, recognition, and stewardship. Additionally, the Philanthropy Officer supports the broader Advancement team as needed.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:

ESSENTIAL DUTIES AND RESPONSIBILITIES	KEY PERFORMANCE INDICATORS (KPIs)
Serve as the Ambassador Manager to further the work of the Pipeline Team. <ul style="list-style-type: none"> • Recruit hosts • Oversee the logistics and process • Lead tours • Follow up with all event attendees 	Hold a minimum of 24 Meet The Relatives tours annually. Evaluate performance using metrics from the Benevon Form for Success.
Oversee and drive strategy of The Relatives’ annual fund. Plan and execute four annual appeals. Coordinate data pulls, messaging, print/graphics, production, and delivery of appeals via email or mail. Manage a portfolio with a focus on \$1,000-\$4,999 annual donors and non-Multi-Year Giving Society pledged donors.	Meet 100% of the annual fund unrestricted dollar goal and key metrics in the annual advancement plan. Assist in securing 100% of the unrestricted dollars to meet The Relatives’ annual budgetary goals.

Serve as the primary manager of the Advancement team's annual stewardship plan.	Build and execute annual stewardship plan in partnership with the Advancement team.
Serve in the lead role for annual winter stewardship event, Caroling with The Relatives.	Assign thank you calls and distribute to other staff members two times per week.
Collaborate with the Director of Communications to create the annual report.	Produce and mail annual report in the spring each year.
Partner with the Donor Relations Associate to ensure proper execution of gift acknowledgement and stewardship.	Stewardship actions executed per annual advancement plan.
Support the Donor Relations Associate in strategy for monthly donor program and e-newsletter.	Incorporate strategies to increase monthly giving into the annual fund as part of the annual plan.
Serve as back-up for gift entry daily functions.	Incorporate annual fund into the monthly e-newsletters.
Support the Volunteer Engagement Officer in strategy for volunteer resources to be appropriately allocated to meet needs articulated by the Program team.	Produce solicitations segmented for volunteers.
Drive strategy to create a pathway from volunteer to annual donor and vice versa.	
Utilize Ambassadors/POE events to recruit and engage table captains utilizing the Benevon model in partnership with the Advancement team.	Produce the BWTR testimonial video and speech(es).
Support ask event planning and logistics. Serve as a senior member of the event planning team.	Complete and execute event logistics as defined in annual advancement plan including but not limited to video production, stakeholder communication, venue, and AV.
Provide assistance with meeting ask event goals to secure new or increased Multi-Year Giving Society donors.	Evaluate performance using metrics from the Benevon Form for Success.
Manage post-event stewardship efforts.	
Ensure adequate documentation of activities, relationships, etc. in agency database and prepare status reports as needed.	Raiser's Edge is up to date with accurate information.
Complete all mandated training.	100% of required training will be completed within specified time frame.
Attendance: Has minimal occurrences of unscheduled absences or lateness.	No more than 5 unscheduled events per year.
Perform all other duties as assigned.	

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Philanthropy Officer - The Relatives

Bachelor's degree preferred. 3+ years related experience required. Proficiency in MS Office applications and the Internet. Raisers Edge experience highly preferred.

LANGUAGE SKILLS

Ability to read, analyze, and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints. Ability to write speeches and articles using original or innovative techniques or style. Ability to make effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors. Excellent communicator with good follow up skills.

MATHEMATICAL SKILLS

Ability to work with mathematical concepts such as probability and statistical inference. Ability to apply concepts such as frequency distribution and correlation techniques.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

CERTIFICATES, LICENSES, REGISTRATIONS

CFRE preferred.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; sit; and use hands to finger, handle, or feel. Specific vision abilities required by this job include close vision, distance vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Employee Print Name: _____

Employee Signature: _____

Date_____

Supervisor Signature: _____

Date_____