WFAE Midlevel Gifts Officer

Reports to: Director of Membership and Major Gifts

Purpose of position:

To secure funds for WFAE by managing a group of assigned donors (caseload) assuring that as many as possible are retained as continuing donors to WFAE and are upgraded in their giving and involvement. The program’s goals are to enhance the experience of mid-level donors (defined as $1200-$4,999), to increase their retention rates, to increase their giving over time, and to identify donors who can move to the major gift portfolio (having major gift capacity and wanting deeper engagement with WFAE).

Ongoing responsibilities:

1. Manages relationships with 500-700 mid-level donors in a tiered portfolio. The portfolio will be defined with input from the Director of Membership and Major Gifts, other WFAE Executives and consultants as appropriate.
2. Engages donors through consistent and active communication to cultivate, steward and solicit them using various channels including phone, email, US mail and occasionally face-to-face, with an emphasis placed on donor retention and increased giving.
3. Uses primarily pre-existing content, such as newsletter articles and blogs, to create personal touchpoints for donors based on their interests and giving. Determines which donors would benefit from more personalized or more frequent contact.
4. Promptly acknowledges gifts from donors in portfolio and other donors who may be mid-level donor candidates.
5. Keep accurate communication records in Allegiance CRM and develop reports to track and report on progress.
6. Identify donors who want a deeper engagement with WFAEs for introduction and “hand off “of relationship management to a major gift officer as appropriate.
7. Serve as the department primary Allegiance CRM liaison with Annual Giving to ensure that segmentation, coding and reporting for ML and MG portfolios are serving WFAE’s needs. Train the Major Gifts Specialist to learn and later assume the Allegiance role.
8. Identify and implement the best wealth screening and other tools.
9. Join WFAE program, cultivation and stewardship events as needed.
10. Keep abreast of tax laws pertinent to charitable giving and keep current on community issues that pertain to WFAE and their mission.
11. Keep current on and conversant with WFAE strategic priorities, programs and projects.
12. Other miscellaneous duties and projects as assigned

Accountability - Performance will be measured by:

1. Demonstrated ability to develop, deepen and sustain positive relationships with donors.
2. Producing error-free work and paying attention to detail.
3. Excellent phone, written, e-mail, and interpersonal skills
4. Genuine curiosity in people, an interest in engaging donors, and uncovering their passions and interests.
5. Highly self-motivated. Ability to work under the coaching of consultant, and as part of a collaborative team.
6. Ability to concisely communicate planned gift vehicles
7. Desire to work in a dynamic and collaborative environment.
8. Ability to create reasonable financial goals for each donor which are based on their giving and their potential
9. Ability to retain and upgrade donors.
10. Ability to secure project and organization information and create and write effective offers, proposals and asks. Ability to secure information that can be sent back to donors to report on how their donation was used.
11. Ability to create timely reports that reflect caseload performance.
12. Ability to have a good relationship with peers and management and maintain a positive and constructive attitude while solving problems.
13. Ability to be a team player and protect the mission, goals and values of WFAE.

*Qualifications*

* Bachelor’s Degree or equivalent work experience
* At least 2 years of development and fundraising experience; public media experience preferred
* Proficiency in using Microsoft Word, Excel, PowerPoint, and Outlook
* Experience with CRM related systems
* Strong project management skills and keen attention to detail
* Ability to connect with people from a variety of backgrounds
* Passionate about the WFAE mission and vision
* Campaign Experience a plus

*Approximate hours per week required by position:* This is an exempt position requiring a minimum of 40 hours per week. Occasional weekend and evening work.

*Travel:* Approximately 50% of time is spent face-to-face with donors. Requires regular travel within the area and occasional longer distances.