



Title: Stewardship Assistant, Full-time position

Reports to: Director, Grants & Donor Engagement

Position Summary

The Stewardship Assistant will provide core support to the President and CEO, Chief Operating Officer, Regional Vice President, and Director of Grants and Donor Engagement. This position will play an integral role in the growth, maintenance, stewardship, and cultivation of the Community Foundation's donors through database management, mailings, planning and managing donor events, and assisting in continued relationship building. Additionally, the Stewardship Assistant will ensure the timely and efficient operation of office administrative duties and assist in the organization's various program areas as needed for the Foundation to carry out its mission.

Donor Stewardship:

- Work with staff to build a culture of gratitude and ensure that donors are appreciated, informed, and engaged
- Help fundholders set up and maintain access to the Fund Advisor Portal as needed
- Process all donor-advised fund grant due diligence, grant entry into CSuite, and prepare all letters for signature and/or electronic system notifications
- Handle all beneficiary grants and prepare grant acknowledgment communications
- Assist with new fundholder welcome communications and other special donor-related communications including mailings, emails, and stewardship calls as needed
- Handle birthday, sympathy and holiday card mailings
- Assist with proactive stewardship and service communications, via both email and phone, to build relationships with Foundation constituents as needed
- Update donor records in CSuite to track engagement in Foundation initiatives and/or events
- Coordinate and execute delivery of special occasion gifts to constituents including professional advisor holiday tins, CPA gifts, board member and governor emeriti gifts, etc.
- Assist with the Partners in Philanthropy program as needed
- Review the newspaper daily for information on donors and notify the appropriate staff member of news and update the database as needed
- Assist with the Foundation's scholarship program as needed
- Provide general administrative support as needed

Events and Logistics:

- Coordinate and execute special events and public events
 - Research, propose, and secure possible venues for Community Foundation functions
 - Propose vendors including caterers, florists, parking services, photography, etc.
 - Manage venue logistics and vendors
 - Verify invoices and arrange for payment of approved event expenses
 - Maintain master event files and documentation to aid in planning and executing future events
 - Compile lists and donor information for invitations and guest lists
 - Track and manage RSVPs
- In coordination with the supervisor, develop and manage budgets for assigned events.
- Manage logistics as requested for meetings with donors, professional advisors, and community members including scheduling, material and presentation preparation, sharing information, taking notes, and room setup

Operations Support:

- Will be the primary contact for telephone and reception duties
- Order office supplies as needed
- Serve as a key resource for CSuite (a customer relationship management database) and become proficient at all aspects of the CRM database, including but not limited to: data entry and report generation, with the ability to manipulate data and create reports and mailing lists, and maintain communication records as needed with donors
- Assist with the production of the Foundation's publications
- Collect, sort and distribute incoming mail
- Handle gift processing including but not limited to:
 - Entering gift data and maintaining organized electronic and hard-copy files
 - Researching and communicating, both externally and internally, about pending gifts
 - Sending gift acknowledgment letters including tribute letters within 48 hours
- Maintain records relating to funds, such as tracking incoming gifts, saving new fund documentation electronically and in hard-copy files
- Assist in preparing board meeting materials
 - Handle meeting communications and invitations
 - Prepare meeting minutes and maintain electronic copies
 - Attend meetings as requested
- Other related duties as assigned

Every staff member employed by the Foundation is expected to:

- Maintain confidentiality and use good judgment, discretion, decision-making and professional and ethical work standards within a fast-paced environment

- Maintain a positive, helpful attitude and a commitment to service in all internal and external interactions
- Be able to prioritize and organization workloads to meet deadlines and balance work among multiple duties
- Work independently with minimal supervision as a member of a team
- Work well with coworkers, especially in a small office
- Receive training and maintain a working knowledge of all office equipment and software
- Abide by all Foundation policies and expectations
- Attend occasional after-hours or evening events
- Minimal travel required
- Possess a valid driver's license, reliable personal transportation and current auto insurance.

Competencies

- Advanced Excel and database management skills and aptitude to learn new programs quickly
- Strong organizational skills that reflect the ability to streamline, perform and prioritize multiple time-sensitive tasks with a critical eye for detail
- Flexible and positive approach to problem-solving in a collaborative team environment and an ability to work collaboratively with multiple audiences
- Demonstrates interest in the nonprofit and/or philanthropic sector (preferred)

Experience and Education

- A Bachelor's degree
- Relevant work experience in a nonprofit or for-profit organization

Attributes

The ideal candidate will demonstrate the following attributes, which describe how we at the foundation strive to do our work with each other and our partners.

- Committed to Excellence
- Passionate
- Collegial
- Open and Honest
- Humble and Self Aware
- Sense of Humor

Salary range \$40,000 - \$46,000, competitive benefits package. Located in professional, downtown offices.

This full-time position is newly created to respond to the Foundation's growth and significant increase in assets. Therefore, this job description is intended to be general, is expected to evolve over time, and will be reviewed periodically and updated as needed.

To apply, send a cover letter and current resume to:

Carly Oliver, Chief Operating Officer
Community Foundation Serving Western Virginia
P.O. Box 1159
Roanoke, VA 24006

Or by email to:

carly@cfwesternva.org