



POSITION DESCRIPTION

POSITION TITLE: Donor Engagement Director
REPORTS TO: CEO
POSITION TYPE: Full-time, Exempt

SUMMARY

Rancho Santa Fe Foundation (RSFF) is implementing an enhanced culture of donor engagement designed to encourage deeper analysis and reflection among ourselves and our donors. This enhanced culture must also be grounded in strategic, efficient, service-oriented operations, designed to make giving with RSF Foundation as seamless as possible. A newly created position, the Donor Engagement Director (DED) is responsible for providing high quality, efficient, and consistently responsive and engaging donor services, educational and thought-provoking experiences designed to move engaged donors along a continuum of learning regarding transformative philanthropic strategies. The Director will promote charitable giving, to and through RSFF, encouraging donors to leverage their assets to transform the lives of people locally, nationally and globally. The new Director, along with the CEO, will lead and implement this enhanced culture of strategically-aligned donor service, by supporting and expanding strategic donor relationships primarily with nonprofit organizations but also with individuals and families. As a significant individual contributor to the overall growth and reputation of the Foundation, the position requires polish, data analytics experience, strong communications skills, and events oversight expertise, with the flexibility to pivot from highly strategic decision making to execution of tasks.

PRIMARY DUTIES AND RESPONSIBILITIES

The Foundation values high-touch donor services in order to attract, retain, and steward community-minded donors, providing the highest level of service to those with the greatest potential for charitable impact. This position provides a unique opportunity to connect with the best aspects of San Diego County by working with donors, RSFF Board Members, and community leaders to support purposeful philanthropy for our region and beyond.

Donor Engagement: Enhance the value proposition of RSFF to our regional agency fundholders, with a particular focus on Rancho Santa Fe nonprofits.

- Initiate and cultivate relationships with new and existing agency donors with the goal of increasing endowed and non-endowed funds and deeper engagement with the Foundation
- Cultivate and steward donors through relationship building for repeat giving and engagement in the work of the Foundation, with emphasis on the Community Impact Fund which provides discretionary grantmaking opportunities for specific programs and initiatives in the region
- Develop and maintain a current understanding of Foundation initiatives and the nonprofit network in San Diego County

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- Research, package, and provide nonprofit, initiative, community, and grant-related information as needed to support agency, donor and prospect relationships, guided by CEO as needed
- Initiate opportunities for interest-based donor engagement, individually and in small groups
- Implement the Foundation's strategic plan as it relates to proactively stewarding and cultivating and soliciting existing agency donors.
- Improve donor relations through regular communications to build strong lasting relationships with existing donors.

Donor Segmentation: Implement a donor segmentation strategy using existing and new research to identify, and develop specific strategies to support donor segments, effective donor communications and maximize staff time and attention.

- Be proficient with the Foundation's databases to research gifts, grants, and funds. Create queries, reports, and exports for donor/fund analysis and for email/ mailing lists for communication pieces
- Manage the donor reports and data output functions of FIMS and the preparation and dissemination of FIMS lists for various publications, events, and other special needs with accuracy and in a timely manner
- Maintain and manage clear and accurate donor services operations documents and procedures (for reference purposes), including creating best practices guidelines and standards
- Work with COO, Finance Director and IT to ensure increased integration between technology systems resulting in optimized data analytics and reporting
- Maintain accurate records of all contacts with current and prospective agency donors

Donor Focused Events: Use donor segmentation tools to create infrequent but regular donor centered events that focus on their areas of grantmaking and also highlight the missions of our agency fundholders.

- Oversee all RSFF donor special events including VisionNow, LINC, Donor Recognition events and smaller, more informational Meet & Greets
- Work with the CEO to produce high-level engagement opportunities involving Foundation and Community leadership.
- Lead in the design and implementation of donor cultivation events such as prospect gatherings, donor education sessions and site visits
- Support efforts to promote and monitor attendance at donor events
- Take lead role on list management for events – from data pulls to follow-up
- Manage special projects of the Foundation as needed such as special grant opportunities, special events and donor segmentation
- Develop and manage donor education and engagement activities and participate in the development and coordination of events
- Serve as a primary development point of contact during events
- Represent the Foundation at various events for the purpose of building new, or strengthening existing, donor relationships.

CEO Support: provide support and assistance to the CEO in her relationships with current fundholders and strategic initiatives.

- Support the CEO by reviewing draft fund agreements and drafting addendums to ensure that donor wishes are clearly and concisely documented and are feasible from an operational perspective
- Participate in continuing education and networking opportunities to stay abreast of local and national trends and resources related to donor cultivation and stewardship, with the goal of enhancing the ways that the Foundation creatively and effectively serves current and new donors
- Work with the RSFF team to resolve and/or develop creative solutions to fund and grant issues and donor requests
- Work with colleagues to develop strategies for CEO's stewardship and cultivation of potential donors
- Support the CEO in her fundraising efforts by briefing her prior to meetings with existing and prospective donors and ensuring acknowledgements and other correspondence to donors are completed in a timely manner
- Promote trust, demonstrate integrity, provide leadership, and support Foundation priorities at all times

Miscellaneous Duties

- Approach deliverables in a proactive, versatile, and efficient manner. Be aware that projects and communications will often be of a sensitive nature and require the highest level of confidentiality
- Use technology tools that play a key role in juggling multiple projects with varying deadlines
- Provide back-up support to the Administrative Assistant to greet visitors, answer calls to the main phone line, and ensure adequate staff coverage during regular office hours
- Inform the CEO of key conversations and action items
- Notify Communications Team of opportunities to highlight donors
- Assume responsibility for special projects as requested by the CEO
- Write and submit reports to the CEO and/or Board as requested
- Perform other duties as assigned

PERSONAL ATTRIBUTES: Strategic thinker, Servant-Leader, Collaborative (encourages a respectful, ethical and collaborative work environment), Community-Minded, Analytical and above all Donor Centered.

EXPERIENCE AND POSITION REQUIREMENTS

- Bachelor's degree in nonprofit management, business or related field
- Ten+ years of nonprofit fundraising experience
- Three+ years' experience working with executive-level volunteers and Boards
- Demonstrated experience with Moves Management or similar fundraising approaches to individual giving
- Strong interpersonal style with exceptional listening, verbal and written communication skills; ability to represent RSFF with professional, business and community organizations

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- Success in handling many priorities in a growing organization; ability to handle ambiguity and nuances; well-organized with strong follow-up and follow-through; and ability to leverage limited resources
- Highly motivated with a strong work ethic; proven track record of exceeding goals and objectives
- Demonstrated proficiency with Microsoft Office package and experience working with CRM systems
- Valid California Driver's License and acceptable driving record; must be able to utilize own transportation for fieldwork (with expense reimbursement)
- Proven track record of achieving short and long-term organizational fundraising
- Demonstrated passion for the nonprofit sector and the mission of the Foundation

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 of the job.

- Extensive use of the computer; this position requires the employee must be able to remain in a stationary position more than 60% of their time
- Employee must see, talk and hear
- Hands are regularly used to write, type, key and handle or feel small controls
- Frequent walking, standing is required
- Utilization of personal transportation for visits around the San Diego community up to 20-40% of the time
- Weights of up to 20 pounds occasionally lifted (carrying devices provided)

The noise level in the work environment is usually moderate.