



## Gift Planning Coordinator

Position: Full time, Regular, Non-exempt

Department: Advancement

Reports to: Director of Gift Planning

Date Reviewed: October 2020

---

**Summary:** The Gift Planning Coordinator (“GPC”) provides administrative support to the Director of Gift Planning and Gift Planning Officers, as well as back up support to other Advancement team members as needed. In addition, the GPA provides support to Events Manager and files all paper work for Continuing Education events; updates and maintains marketing materials for the team; and is responsible for drafting and processing gift acknowledgment letters.

### **Responsibilities and Expected Outcomes:**

- Provide daily administrative support to Director of Gift Planning, Gift Planning Officers, and other Advancement team members as needed to ensure that those supported have the tools and information necessary to successfully carry out their objectives. This includes proactively and independently scheduling appointments, screening calls, responding to inquiries, transcribing and composing correspondence, data entry, coordinating travel arrangements, preparing expense reports, etc.
- Provide assistance for Continuing Education seminars and cultivation events including preparing mailing lists, filing CE paperwork with state boards and preparing detailed agendas. File all credits with appropriate boards.
- Track payroll contributions from organizational donors, resolve discrepancies, and prepare acknowledgements at first of year.
- Assist Event Planner with implementation of other local events including those designed for professional advisors, prospective donors, and advisory committees to ensure that the Advancement team’s outreach and educational efforts continue to support fundraising strategies. Coordinate registration of NOPGC and EPC events, etc. for department.
- Respond efficiently and effectively to general and specific inquiries from donors, prospective donors, organizations, and professional advisors to ensure the highest level of service.



- Process new gifts; matching gifts; complex gifts; testamentary gifts and bequests.
  - Serve as primary contact for delivery of securities, wire transfers, and credit card gifts.
  - Serve as liaison to the Finance Team and Foundation's custodial bank partners for the receipt and valuation of gifts and the proper allocation of same.
  - Produce gift acknowledgement letters.
  - Serve as point person to create database records for new donors, advisors, accounts, and organizations.
  - Serve as point person to create new funds; and also to transition, liquidate, and close funds.
  - Provide support for year-end tax reporting for charitable gift annuities and trusts.
  - Provide support to donors and organizational fund partners for new and existing gifts to their funds, fund statements, fund distributions, and/or grants.
  - Prepare weekly, monthly, quarterly, and annual reports for gifts, new funds, planned gifts, estate and trust expectancies, and life insurance policies.
- 
- Assist in the preparation of professional advisor and prospective donor-related communications and coordinate mailings as needed. Assist Gift Planning team members with merging of CRT letters, organization letters, and email blasts.
  - Independently design, update and provide PowerPoint presentations, as needed.
  - Compile and prepare docket information and send correspondence to the African American Philanthropy Committee (AAPC) in a timely manner. Provide staff support for all AAPC events.
  - Keep all marketing materials updated for the Advancement Team to use with professional advisors and current/prospective donors..
  - Consistently and accurately add donor contact logs and information to TCF database system (Stellar).
  - Other related duties and tasks as assigned.

**Essential Qualifications, Credentials and Technical Skills required:**

- A paralegal certificate or equivalent preferred, working in a professional legal office environment or equivalent, and supporting a highly visible, dynamic team. Focus on estate planning and probate work or related is highly desirable.
- Ability to plan and execute work independently and anticipate and solve problems as they arise.
- Ability to respond sensitively and patiently to staff, donor and community inquiries in a timely manner, and ability to handle sensitive information and maintain confidences.



- Demonstrated customer service orientation and an ability to interact confidently and effectively with people of diverse cultural and socio-economic backgrounds.
- Ability to take a proactive role in team efforts, promote cooperation and collaboration between team members and encourage open communication in multidisciplinary teams. Ability to anticipate when additional administrative support may be needed on the gift planning team as well as with the teams within the Advancement department and the willingness to provide additional support to further the work of the department overall.
- Demonstrated detail orientation, flexibility, and ability to coordinate several projects simultaneously with a series of continuous deadlines with minimal supervision and support.
- Excellent grammar, spelling, proofing, and organizational skills.
- Intermediate proficiency in Microsoft Word, Excel, PowerPoint, and Outlook as well as Internet research, database input/maintenance and the ability and desire to continually learn new technology as appropriate for the job.

**APPLICATION PROCESS:**

Starting salary for this position will be commensurate with the selected candidate's background and experience. The foundation offers an exceptional benefits package including medical, dental, vision, life and disability coverage, a comprehensive wellness program, a fully vested 403(b) retirement plan and two weeks of vacation the first year of service, prorated based on date of hire. If you are interested in applying for this position, please send a resume and cover letter **indicating salary requirements** to [resumes@clevefdn.org](mailto:resumes@clevefdn.org) by November 9, 2020. ***We regret that we cannot respond personally to each applicant.***

**Our Mission:**

to enhance the lives of all residents of Greater Cleveland, now and for generations to come, by working together with our donors to build community endowment, address needs through grantmaking, and provide leadership on key community issues.

**Our Vision:**

to use the power of philanthropy to enable Greater Cleveland to be a great and global American city. Together with our donors and partners, we will make innovative, impactful, and internationally recognized contributions to the field of philanthropy.