

Job Description

Title: Development Coordinator	Date: 2/24/20
Select One: <input type="checkbox"/> New Position <input checked="" type="checkbox"/> Revised Job Description	
Position Classification (for internal purposes): Business Support III	
Status: <input checked="" type="checkbox"/> Full-Time; <input type="checkbox"/> Part-time; <input type="checkbox"/> Temporary (length of assignment)	# of hours/week: 40+
FLSA Classification: <input type="checkbox"/> Non-exempt; <input checked="" type="checkbox"/> Exempt	
Location: Office <input checked="" type="checkbox"/> Portland <input checked="" type="checkbox"/> D.C. (Preferred) and/or Remote <input type="checkbox"/> Remote location(s):	
Position Reports To (title): Development Director	Department: Development

Organization: Across the nation, Compassion & Choices works to create a society that affirms life and accepts the inevitability of death, embraces expanded options for compassionate dying, and empowers everyone to choose end-of-life care that reflects their values, priorities and beliefs. To make this vision a reality, we improve care, expand options and empower everyone to chart their end-of-life journey.

Position Summary: This position serves on the Development Services team (within the Development department) and contributes to 5 key areas of work:

1. Planning and preparing for special events held across the country from behind-the-scenes
2. Manage database with duties that range from running queries and creating reports, to editing individual donor records, and data hygiene (householding, deduping, etc.)
3. Drafting foundation grants and reports that draw upon a pool of approved documents, and preparing final materials for submission
4. Providing administrative assistance to the Chief Development Officer (CDO) to arrange travel, communicate with donors to secure meetings, manage expenses, and other tasks as assigned
5. Contributing in general ways to the Development Team's work including, but not limited to, serving as back-up for other team members, planning team gatherings, executing a variety of donor cultivation mailings, general administrative work, and other duties as assigned

Essential Duties and Responsibilities: Core duties and responsibilities include the following:

Special Events

- Coordinate with major gifts officers, CEO's office, communications team, advocacy and constituency staff, hosts and others to prepare for and implement a variety of special events to cultivate and recruit donors and other supporters. These events range from small group gatherings of fewer than 10 people over coffee, to large lecture hall presentations, in-home cocktail parties and dinners, conference call programs for up to 100, and 150+ person seated events at rented rooms with sponsors, host committees, volunteers, staged programs, etc.
- Lead pre-event scoping calls to collect key information and drive preparations throughout the planning process including the completion of post-event actions. Maintain schedules, timelines, and deadlines, communicating regularly with staff who are assigned tasks to ensure work is completed on-time and in-full.
- Manage invitation production with duties that range from drafting text for review, securing approval, coordinating with graphic designers, pulling lists from the database and coordinating lists from other sources, producing envelopes and/or labels for postal invites, stuffing and mailing postal invites, and collaborating with C&C's Digital department on the sending of eblast invites and follow ups.
- Receive RSVPs and respond to guests, manage lists of responses in spreadsheets and the database. Make follow up calls or emails to invitees who have not responded, and/or oversee outreach conducted by volunteers.

Date: 2/24/2020

Job Description

- Prepare and mail all on-site materials including packets and other handouts. Produce name tags and check-in lists. Conduct research on attendees and prepare pre-event briefings for staff and speakers.
- Coordinate logistics including catering, materials development, host thank you gifts, budget and invoices.
- Ensure the completion of post-event follow-ups including data entry to input guest information into the database, completion of post-event staff notes, post event thank yous to host and guests, including eblasts.
- On-site event representation and management is generally not needed to staff most events, with exceptions for a small number of local events.

Database and Data Management

- Build complex queries (with inclusions and suppressions) and reports to produce financial reports, prepare mailing lists, analyze the effectiveness of fundraising and cultivation efforts, track groups of people, and produce data around a variety of other metrics and data analysis.
- Manually edit database contact records both individually and via bulk updates.
- Lead ongoing data hygiene efforts including record deduping, householding, mailing address maintenance, management of salutations/envelope addressee data, coding, channel opt-in and opt-outs, etc.
- Respond to questions and investigate to identify and correct contact and contribution records
- Work in spreadsheets to analyze, manage, and manipulate data manually and in bulk using functionality such as sorts, filters, formulas, and formatting applications. Use vlookups and other advanced capabilities to merge and match lists.
- Follow and/or create documented business rules and standard operating procedures to ensure complete, accurate, and consistent data management and the protection of key constituents where communication and contact with staff is tightly controlled.

Foundations

- Develop fundraising proposals and reports. Draw from a pool of existing materials (including past submissions to the funder) to thoughtfully prepare first drafts for other team members to edit and finalize.
- Gather data points and content from staff on items of specific interest to funders, including state or project specific information and metrics to include in proposals and reports.
- Prepare final materials for mailing and online submission, carefully following each grantmaker's specific structures, requests, and deadlines.

Chief Development Officer (CDO) Support

- Provide executive administrative support, with limited oversight, around meetings and travel. Duties include:
 - managing calendars to schedule meetings on occasion
 -
 - conducting travel research and secure bookings
 - preparing presentation materials for meetings, speaking engagements, and events (e.g., writing, photocopying, collating, stuffing, mailing)
 - tracking and submitting expenditures for reimbursement
 - assisting with donor communication and mailings
 - ensuring all company deadlines are met and policies followed
- Coordinate to collect and share information with CEO's office, major gift officers, and other C&C staff, volunteers, and hosts. Ensure all logistics are finalized and communicated to pertinent staff, and that staff complete post-trip follow-up (e.g., thank yous, action items).

General

- Serve as back up for other Development team members to complete a wide array of tasks.
- Engage and oversee general and executive program volunteers around select projects.

Job Description

- Organize logistics for team gatherings including securing catering and hotels, agenda setting, developing presentations and taking notes, among other logistics.
- Complete required C&C staff reports including company credit card statement, time cards, mandated training, and other human resource requirements on a timely and accurate basis.
- Demonstrate commitment to actively supporting C&C's Diversity, Equity, and Inclusion initiatives, it's overall strategic plan, and other organization-wide goals.
- Complete other duties as assigned.

Supervisory Responsibilities: None.

Values: Must be energized by the idea of working at an organization with the following values:

- **Compassionate** in our conviction that dying patients should be free of unwanted treatment, suffering or outside interference.
- **Respectful** of the autonomy of individuals to decide what end-of-life options are best for them and their family.
- **Courageous** in our willingness to confront the toughest end-of-life health challenges, disrupt the broken status quo and protect an individual's right to self-determination.
- **Credible** in all our education, advocacy and partnerships — our efforts are grounded in objective research and demonstrable facts.
- **Resilient** in our capacity to respond to opportunities and threats in the movement so that we can achieve our vision as quickly as possible.

Competencies: To perform the job successfully, an individual should demonstrate the following competencies:

- **Customer Service (Internal/External)** - Communicates with others clearly, compassionately, politely, positively, and diplomatically. Brings a learning mindset to one's work and patience when guiding or teaching others. Responds promptly to customer needs and requests and meets commitments. Completes tasks as assigned and on deadline. Solicits feedback to improve service. Applies learnings to self, others, while identifying opportunities to improve structures and processes to better serve customers.
- **Planning/Organizing** – Effectively prioritizes and plans work activities. Manages competing demands. Uses time efficiently. Strives to increase productivity. Organizes or schedules self and others to complete tasks on schedule. Develops realistic action plans. Works with limited supervision while seeking guidance or clarification as needed and elevates problems or issues that require attention by supervisor and others.
- **Detail oriented** – Possesses extraordinary attention to detail.
- **Oral communication** - Communicates clearly and effectively. Communicates changes to plans that impact others and progress on assigned tasks.
- **Written Communication** - Writes clearly and informatively. Edits work for spelling and grammar. Varies writing style to meet needs. Presents numerical data effectively. Translates concepts into writing. When drawing from previously developed materials, selects carefully, and adapts what and how information is presented to suit the situation.
- **Quality** - Demonstrates accuracy and thoroughness. Looks for ways to improve and promote quality. Applies feedback to improve performance. Monitors own work to ensure quality.
- **Quantity** - Meets productivity standards. Completes work in a timely manner. Strives to increase productivity.

Date: 2/24/2020

Job Description

Works quickly.

- **Adaptability** - Adapts to changes in the work environment. Changes approach or method to best fit the situation. Able to deal with frequent change, delays, or unexpected events.
- **Critical Thinking/Problem Solving** - Gathers and analyzes information skillfully to inform analysis and solutions. Develops alternative solutions. Exhibits sound and accurate judgment. Includes appropriate people in the problem-solving and decision-making process. Identifies and resolves problems in a timely manner. Works well in group problem solving situations.
- **Initiative** - Volunteers readily. Undertakes self-development activities. Seeks increased responsibilities. Looks for, and takes advantage of, opportunities to advance team and organizational goals. Asks for and offers help when needed.
- **Judgment** - Exhibits sound and accurate judgment. Displays willingness to make decisions. Supports and explains reasoning for decisions. Seeks input from others. Makes timely decisions.
- **Teamwork** - Balances team and individual responsibilities. Exhibits objectivity and openness to others' views. Gives and welcomes feedback. Contributes to building a positive team spirit.

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.

- **Commitment to:**
 - upholding organizational mission and values
 - advancing leadership's vision and Strategic Plan
 - working ethically, with integrity, and maintaining confidentiality
- **Education & Professional Experience:**
 - Bachelor's degree in a related field such as business, nonprofit administration, or communications, OR equivalency of related experience
 - 2-3 years experience in nonprofit Development department or equivalent
- **Skills in the 5 keys areas of work described:**
 - Behind-the-scenes event planning experience and knowledge is required. Strong organizational skills and attention to detail are critical, as is the ability to manage a wide variety of tasks, deadlines, and priorities simultaneously.
 - Understanding of donor database/CRM systems including complex query and report building, coding, gift structures (hard and soft credits, source codes, and general ledgers), logic and workflows, and other basic functionality is necessary. Specific experience of EveryAction would be helpful but is not required.
 - Foundation grant writing and report development experience is preferred but not required.
 - Strong general administration skills are needed.
- **Computer Skills:**
 - In addition to specific database skills noted above, to perform this job successfully, the candidate should have working knowledge of basic computer functions. These include (but are not limited to) spreadsheets, word processing, calendar and email management, document management, phone and video conferencing.
 - Google Suite knowledge is helpful.
 - Fluency in internet research is important.

Job Description

- The ability to adapt to new software tools and enhancements as well as other technologies as they become available is essential.
- **Language Skills:** Candidates must have the:
 - Ability to read, analyze and interpret various written materials as well as financial reports.
 - Ability to respond appropriately to common inquiries or complaints from customers.
 - Ability to effectively present information to colleagues, donors, volunteers, and vendors.
- **Interpersonal skills** must be strong. The ability to work effectively as part of a team is essential.
- **Reasoning:** Ability to define problems, collect data, establish facts, and draw valid conclusions.

Other Qualifications

- **Certificates, Licenses, Registrations:** None
- **Travel:** Must be able and willing to travel (overnight and possible weekends). Up to 10% of time may be spent on travel.

Environmental

- **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 is frequently required to sit for longer periods of time. The employee is occasionally required to stand and walk (includes maneuvering through airports and hotels). The employee must occasionally lift and/or move up to 25 pounds.
- **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 and typical of that found in an office environment. While performing the duties of this job, the employee is occasionally exposed to outside weather conditions.

<<end>>

Approved by Sr. Leadership:		Title	Date
Print Name:	Signature:		
Trish Bernstein		COO	Feb 28, 2020