Individual Giving Manager

Reports to: VP of Development & Marketing
Supervises: Volunteers, Interns
Schedule: Full-time, 40 hours per week
Wage Scale: $42,500 – $45,000
FLSA Status: Non-exempt

PENCIL’S TEAM VALUES:

Our work is guided by the needs of Metro Nashville Public Schools, is student centric, and is achieved through partnerships and tangible engagements.

As the PENCIL team, we will:

- Be collaborative and transparent
- Act with integrity
- Demonstrate kindness and gratitude

POSITION SUMMARY:

The Individual Giving Manager is responsible for donor acknowledgments, donor tracking, executing a multi-medium fundraising solicitation strategy including phone calls and mailings, benefit and recognition fulfillment, and CRM maintenance. They will communicate with all potential and confirmed guests to organization events via email, phone and in-person to create a healthy rapport. The Individual Giving Manager’s responsibilities are both detail and timeline-oriented as well as require donor centric, customer service demeanor to build successful and lasting donor relationships.

ESSENTIAL FUNCTIONS:

The Individual Giving Manager will gain a proficient understanding of our donor database, Salesforce, to utilize as an essential tool to successfully execute the donor acquisition and retention strategies. They will also oversee internal portfolio management systems related to key individual asks, including maintaining moves management records, developing and integrating key fundraising messages within fundraising collateral, supervising prospect strategies and timelines, coordinating deliverables, ensuring a robust stewardship tracking process and participate in revenue projection and budgeting based on known and potential opportunities.

Linking community resources to Nashville Public Schools to help young people achieve academic success and prepare for life.

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hr@pencil615.org | www.PENCILforSchools.org
Perform other functions as assigned, outside of the list below:

**Donor Data Management**
- Maintain accurate constituent records in Salesforce (merge duplicates, contact info changes, job changes, deleting inactive records, address updates, update salutations, etc.) with the assistance of the Data Manager
- Assist Salesforce Administrator with any additional data management needs
- Ensure volunteer, guest and donor email newsletter list segments are updated & accurate

**Solicitations**
- Manage timely and successful execution of a multi-faceted fundraising project plan
- Request or create contact lists and prepare all mass fundraising appeals: postal mail, email, phone call, text message, push notification, etc.
- Focused campaign attention to different donor and prospect donor segments: Gift Renewals and Upgrades, L YUNTY, SYBUNTY, Never-given, and New Donors from existing prospects
- Build/identify donor acquisition lists from NEW prospect sources
- Generate and regularly distribute fundraising metric/tracking reports to the Executive Team
- Assist Development Team to pull lists of donors as needed for their portfolio donor calls for renewal and other stewardship correspondence
- Build online donation forms for unique campaigns through the software Classy
- Manage campaigns, track donations and event attendance, and pull related reports from CRM
- Prepare annual donation summary tax letters at the beginning of the calendar year for all relevant donors including renewal options for those not on auto-recurring donation program
- Specific focus on Alumni Board giving and retention of board members as major donors
- Assist the relationship managers for the Board of Directors, Alumni Board, and Emerging Leaders Board with their respective pledge accounts receivable

**Gift Entry & Acknowledgements**
- Enter and code all donations, pledges, and grants (incl. soft/hard credits) into Salesforce according to the revenue budget (with the supervision of the VP of Development and Marketing and VP of Finance and Operations) with descriptive donation notes ensuring all donor data/contact roles are collected and tracked accurately
- Record all in-kind donations to special events in Salesforce
- Reconcile supporter information between Classy & Salesforce
- Reconcile all revenue sources with Salesforce (Benevity, United Way, YourCause, Network for Good, etc.)
- Reconciliation with accounting records
• Document donor acknowledgement letter protocols (tribute, stock, in kind gifts)
• Create and mail all donation/grant thank you/tax letters within 24-48 hours of gift receipt
• Assign and maintain Board Thank You Notes, keep a log of which board members send to whom

**Donor Service & Stewardship**
• Assist donors with Classy account updates, gift processing AND solicit upgrades, make sure we have all their info right, etc.
• Initiate reports for donor stewardship tasks for assigned owners
• Support Executive Assistant in sending emails to donors on behalf of the CEO, through Outlook and mass emails through Salesforce
• Assist in the management of Stewardship Tasks through CRM platform
• We view guest communications and customer relations as an important step in the cultivation and maintenance process within the donor pipeline. With that in mind:
  ▪ Assist Marketing and Events Manager by owning all outbound and inbound communications with constituents as related to special events and experiences. This includes but is not limited to:
    ▪ Sending invitations, collecting RSVPs, answering questions by phone and email, trouble shooting, on-site support during events and experiences

**QUALIFICATIONS:**

- **EDUCATION** – Bachelor’s Degree is preferred; Associate’s Degree at a minimum

- **SKILLS** –
  ▪ Excellent donor centric/customer service skills and relationship management skills
  ▪ Success with mastering technology and using it to gain efficiencies
  ▪ Ability to prioritize multiple tasks and hit deadlines
  ▪ Able to work independently and proactively without daily instruction is critical, but must display teamwork and conflict resolution skills
  ▪ Organized and able to keep accurate and detailed documentation
  ▪ Excellent written and oral communication skills

- **EXPERIENCE** – 2 + years of experience in a similar role with successful donor acquisition, retention and upgraded donations

- **CONFIDENTIALITY** – ability to manage sensitive information in a professional and confidential manner as outlined in PENCIL’s Confidentiality Policy
 ENVIRONMENTAL CONDITIONS & PHYSICAL DEMANDS:

- Moderate physical activity performing somewhat strenuous daily activities of a primarily administrative nature.
- Manual dexterity sufficient to reach/handle items, works with the fingers, and perceives attributes of objects and materials.
- The employee must occasionally lift and/or move up to 25 pounds.
- The employee is required to stand, walk, climb and balance.

 WORK SCHEDULE & HOURS:

This position will regularly be scheduled to work 40 hours each week, typically Monday – Friday between 8 a.m. – 5 p.m., with occasional evening and weekend hours for special events. This position is eligible for full benefits.

 HOW TO APPLY

Qualified candidates should please submit by 8am Monday, April 19th a cover letter, resume, two professional references, and a relevant writing sample (not to exceed 2 pages) to hr@pencil615.org. Please, no phone inquiries. Thank you for your interest!

 DISCLAIMERS:

This job profile is not intended to be all inclusive of tasks required, it is to provide a general description of essential job responsibilities.

PENCIL is an affirmative action and equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, protected veteran or disabled status, or genetic information.