

Job Title: Development and Philanthropic Services Coordinator

FLSA Status: Full Time; Non-Exempt

Salary Grade: 9

Date: October 2026

Reports to: Vice President of Development

ORGANIZATIONAL MISSION

To enhance the quality of life for our citizens now and for future generations by building community endowments, meeting needs through grantmaking, providing leadership, and promoting collaborations on community issues.

PRIMARY PURPOSE OF JOB

The Development and Philanthropic Services Coordinator provides essential administrative, project, and donor engagement support to all members of the Development and Philanthropic Services team. This role coordinates cross-functional tasks, supports donor stewardship activities, and manages special projects such as the Legacy Society and the Professional Advisors Council. This role ensures donor experiences are consistent, timely, and well-documented in alignment with the CFO's mission, vision, and values.

ESSENTIAL FUNCTIONS AND PERFORMANCE AREAS

- Handle welcome process for all donor and agency established funds.
- Provide administrative, project, and logistical support to the Development team, including meeting preparation, calendar coordination, agenda preparation, follow-up tracking, and coordination of team priorities.
- Track Development team action items, donor follow-ups, stewardship commitments, and project deadlines to support timely and consistent relationship management.
- Maintain organized Development files, donor materials, meeting notes, project records, and related documentation in accordance with internal procedures.
- Serve as a professional and responsive point of contact for routine donor and agency partner questions, requests, and meeting coordination, escalating complex or sensitive matters to appropriate Development staff.
- Assist with donor and agency partner engagement activities, including visits, meetings, recognition opportunities, small gatherings, and other stewardship touchpoints.
- Coordinate with internal teams to ensure donor and agency partner information is accurate, current, and consistently documented in CSuite.

- Maintain accurate Professional Advisors Council records in CSuite and related tracking tools, including member information, participation history, communications, and engagement notes.
- Assist with planning and execution of Professional Advisors Council programs, events, educational sessions, and outreach efforts in coordination with Development staff.
- Coordinate data, communications, recognition, and program support for the Legacy Society, including member tracking, stewardship activities, event support, and documentation of planned giving intentions as appropriate.
- Maintain accurate Legacy Society records and engagement history in CSuite, ensuring information is complete, confidential, and consistently coded.
- Generate Development reports, lists, and exports to support donor stewardship, prospect management, event planning, campaign tracking, and leadership updates
- Coordinate with the Database Coordinator, the Operations team, and the Development and Philanthropic Services team to support consistent data-entry standards, relationship tracking, and reporting practices
- Assist with donor stewardship activities, including preparing thank-you correspondence, impact updates, recognition lists, donor reports, and other touchpoints that support meaningful donor engagement.
- Support creation and maintenance of donor stewardship plans, timelines, and tracking tools.
- Assist with basic prospect research, donor background preparation, agency partner information gathering, and other research needed to support Development team relationship-building.
- Support designated fund administration by reviewing fund records, monitoring spendable balances and beneficiary organizations, coordinating annual distributions, maintaining accurate documentation, and managing follow-up reporting to help ensure funds are used in alignment with donor intent.
- Assist with coordination of family philanthropy meetings and activities, including preparing agendas, gathering fund information, documenting next steps, and supporting follow-up with family members and internal staff.
- Provide backup support to Development staff for donor-advised and agency partner grant processing as assigned, including preparing documentation, entering or reviewing information, tracking approvals, and coordinating follow-up with internal staff.
- Perform other duties and responsibilities, as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

- Proficiency with Microsoft Office Suite software; strong working knowledge of Word and Excel and familiarity with PowerPoint.
- Technical capacity to learn and understand database systems.
- Ability to handle sensitive information with discretion and confidentiality.
- Excellent verbal and written communication skills in a professional tone.

- Strong organizational and project management skills with attention to detail.
- Ability to manage multiple priorities and deadlines.
- Ability to work independently and on a team, be self-motivated, and meet departmental team goals.
- Ability to work in a fast-paced, team environment with frequent interruptions.
- Ability to work occasional early mornings or evenings.

CFO CORE PRINCIPLES

Collaboration: *Connection builds community.*

Accountability: *Trust leads to transformation.*

Vision: *We are catalysts for legacy.*

CFO COMPETENCIES

Building Trust – *Interacting with others in a way that gives them confidence in one's intentions and those of the organization.*

Constituent Focus – *Ensuring that the constituent perspective is the driving force behind organizational decisions and activities; crafting and implementing service practices that meet constituent needs.*

JOB SPECIFIC COMPETENCIES

Building Constituent Loyalty – *Effectively meeting donor and internal customer needs and taking responsibility for service quality.*

Engagement Readiness – *Demonstrates commitment to deadlines and donor experience standards.*

Managing Work (including Time Management) – *Coordinates multiple projects with clear tracking.*

Quality Orientation – *Ensures donor-facing materials are accurate and polished.*

EDUCATION, TRAINING AND EXPERIENCE REQUIREMENTS

- High school diploma or equivalent required.
- Bachelor's degree in nonprofit management, business or other relevant field preferred.
- One to three years' experience in administrative coordination, donor services, or nonprofit operations preferred.
- Experience supporting committees/councils is a plus.
- Must possess a valid driver's license and have a good driving record.

PHYSICAL CONTEXT AND WORK ENVIRONMENT

Physical Requirements	Percentage of Work Time Spent on Activity			
	0-24%	25-49%	50-74%	75-100%
Seeing: Must be able to see to read documents/reports and use computer.				X
Hearing: Must be able to hear well enough to communicate with staff, donors, vendors, and general public.				X
Sitting: Must be able to sit for long periods of time.			X	
Standing/Walking: Must be able to move about the work area.		X		
Climbing/Stooping/Kneeling: Must be able to stoop or kneel to pick up items off the floor.	X			
Lifting/Pulling/Pushing: Must be able to lift 20 pounds with or without reasonable assistance.	X			
Grasping/Feeling: Must be able to type, handle documents, and use equipment and electronic devices.				X
Travel/Drive: Must be able to drive to various locations.	X			

WORKING CONDITIONS

The work environment is based at the CFO's Springfield office, which is a well-lighted, environmentally controlled indoor environment with a moderate level of noise. Normal business hours are Monday through Friday 8am to 5pm with a lunch hour. This position may be eligible for remote work as agreed upon with supervisor in accordance with organization policies. Willingness to work occasional early mornings, nights, and weekends for donor meetings/events as necessary.

The statements herein are intended to describe the general nature and level of work being performed but are not to be seen as a complete list of responsibilities, duties, and skills required of personnel so classified. Also, they do not establish a contract for employment and are subject to change at the discretion of the employer.

Employee Signature

Date