



## **Donor Services Officer**

**Reports to: Director of Donor Services/Planned Giving Specialist**

**Position Status: Full-Time, Exempt**

### **POSITION SUMMARY**

The Donor Services Officer (DSO) is responsible for implementing a comprehensive donor relations program to promote interaction with and recognition of donors at all levels. The program goal is to enhance relationships with donors by gaining in-depth knowledge of their values, interests, and financial capabilities, matching their interests with Foundation programs, and being an active solicitor of donors to grow the size of their funds. The officer will lead or participate in projects to form donor partnerships and engage donors in the Center for Philanthropy, when appropriate. The DSO will also have familiarity with planned giving strategies and how to integrate planned gifts into conversations with existing donors.

### **PRIMARY DUTIES AND RESPONSIBILITIES**

- Manage and execute the current donor relations process, which includes making and coordinating phone calls, meetings, correspondence, site visits, seminars, surveys, etc.
- Work with donor services team to meet expectations of the department--- that each donor assigned to the position receives the appropriate contact each year and is thoughtfully asked and solicited to increase their participation, where appropriate.
- Complete approximately 100 individual donor visits per year and provide appropriate follow-up for these relationships.
- Ability to have conversations with donors regarding the benefit to donating assets from a tax and estate tax planning perspective as means to increase gifts to The Pittsburgh Foundation.
- Explore creative ways to engage donors within the Center for Philanthropy.
- Educate donors, or connect donors to Program staff when appropriate, such that consideration may be given to expanding donations and growing their fund to benefit these causes.
- Provide information to donors, as requested, to ensure that they are making educated grant making decisions.
- Accurately record all interactions with donors in the database to ensure that annual contact goals set by the department are achieved.
- Leverage the standard fund management practices of the Foundation to create agreements that are easily and consistently administered in accordance with the donor's intent.
- Keep detailed records of donor's interests, ages, family engagement, potential opportunities for growth.

- Participate and assist in various events and donor engagement opportunities which enhance relationships with donors or potential donors, such as the wish book, site visits, donor appreciation events, etc.
- Work with multi-generational families at The Pittsburgh Foundation to engage them in giving opportunities and connect them with appropriate staff and nonprofits to steward their grant making experience.
- Maintain a clear understanding of TPF policies related to all fund types.
- Maintain an understanding of rules and regulations for fund expenses, including those related to fundraisers.
- Conduct presentations to prospective donor or advisor groups, when assigned.
- Work collaboratively and closely with all staff at The Pittsburgh Foundation.
- Other tasks as assigned.

## **KEY SKILLS AND ABILITIES**

- Proven ability to work successfully with diverse populations and demonstrated commitment to promote and enhance diversity, equity and inclusion.
- Commitment to the foundation's values of collaboration, trust, racial justice, community and accountability.
- Experience in fundraising with ability to use the knowledge and expertise to help donors grow the size of the fund and ensure they create a lasting philanthropic legacy at our organization.
- Highly detail oriented; being able to keep track of each individual relationship with donors and their specific needs.
- Ability to work independently and develop solutions to a variety of problems that may arise.

## **QUALIFICATIONS AND EXPERIENCE**

- Bachelor's degree/ or equivalent work experience.
- Requires minimum of seven (7) years professional experience in a donor relations or development position.
- Exceptional customer service attitude.
- Excellent interpersonal and communication skills.
- High degree of proficiency in Microsoft Office suite.
- Experience with development / sales contact systems.
- High levels of accuracy, productivity and initiative are required.
- High degree of professionalism and the ability to work independently and solve problems
- Able to maintain confidentiality.
- Possess ability to prioritize work and meet deadlines under pressure.
- Works well within a dynamic team environment.
- Flexibility in meeting changing demands.
- Knowledge of planned giving strategies a plus.
- Preferred experience in Blackbaud Raiser's Edge.

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**TO APPLY**

Interested candidates should submit resume and cover letter to [jobs@pghfdn.org](mailto:jobs@pghfdn.org).

No phone calls please.

**THE PITTSBURGH FOUNDATION IS AN EQUAL OPPORTUNITY EMPLOYER  
COMMITTED TO DIVERSITY, EQUITY AND INCLUSION.**

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**ABOUT THE PITTSBURGH FOUNDATION**

Established in 1945, The Pittsburgh Foundation is one of the nation's oldest community foundations and is the 15th largest of more than 750 community foundations across the United States. As a community foundation, our resources comprise endowment funds established by individuals, businesses and organizations with a passion for charitable giving and a deep commitment to the Pittsburgh community. The Foundation has approximately 2,400 individual charitable funds and, together with its supporting organizations, assets of more than \$1.3 billion. Grantmaking from the funds benefits a broad spectrum of community life within Pittsburgh and beyond with more than 2,000 grantees receiving funding annually. The Foundation typically awards grants of more than \$40 million each year. Grantmaking from the Foundation's discretionary funds leverages a broad range of resources and enables the Foundation to be an important change agent for the region. Approximately 85% of all grant-making dollars stay within the Pittsburgh region.