Director: Client Services, Donor and Community Engagement
Reports to: President

Key Responsibilities: Fundraising

- Assist with planning and then, execute as assigned:
  - Top Donor outreach
  - Community Engagement
  - Sponsorship
- Manage cultivation, solicitation, and stewardship – individuals and corporations/businesses, as assigned
  - Review wealth screens
  - Execute meaningful personal solicitations that align with donor interests and the organization's needs and strategic plan
  - Work with President to select and rate prospects
- Secure 1:1 donor meetings and solicitations (in-person or zoom) to establish and/or strengthen donor relationships
  - List management and tracking
  - Prepare prep memos and meeting summaries

Key Responsibilities: Client Services

- Out of office planning and tracking for all IG/Events/Comms staff to ensure work/assignments stay on track; be back up for other managers on the grants side for out of office planning and track to dos to stay on track
- Coordinate sales/upsell meetings for prospects and current clients
  - Set up meetings
  - Bill4time folders
  - Email correspondence – emails, access to folders and other information implicit to our work
  - Assist with creating scopes of service(s)
- Coordinate new client onboarding
  - Set up meetings
  - Assist president to assign managers to accounts
  - Bill4Time folders
  - Saving scopes, contracts
  - Provide client contact and rates information to billers
  - Ensure a process/system is in place to begin new client and/or service work
    - Create a form would be routed to the appropriate staff for execution
    - Obtain passwords and logins for grant portals and social media and saved to password list
    - Assist client to set up JMA access to accounts

- Interface and request client files be sent or uploaded to Dropbox/Google Drive
- Drop box set up
- Assist client managers to request and obtain files as needed

Initiate and monitor all client meetings for across JMA divisions: weekly and/or monthly

- Assign meeting note taker by clients and fill in whenever staff are not available
- Create agendas and draft meeting summaries
- Monitor all "to dos" from meetings and work with managers to assign and/or do/be assigned the work whenever other staff are not available
- Monitor work from home tasks and completion, productivity and staffing concerns related
- Work with client managers (and clients as directed) to develop plans to resolve issues/problems for clients or/projects
- Ensure all assignments get into the All-Assignments Sheet (grants and IG/comms/Events)
    - Acquire through staff interaction/email, status updates on all assignments, and work with Development Coordinators as they are completed, and distributed to staff
- Working with Office Manager and CFO, provide monthly staff productivity reports by division
- Ensure client billings are at maximums (monthly) – bi-weekly (T & Fri) review of billings
    - Work with CFO on tracking realization for client accounts
    - Review billing rates every month (minimum) for increases/changes
    - Review tracked client time, weekly, bring to the attention of client manager and president concerns, issues related to billing
- Assist with new business development
    - Assist to respond to RFPs, job announcements
    - Assist with Scopes of Service, Meetings, Contracts
    - Assist to secure new business accounts
- Provide twice weekly reports provided to president – review of all staff admin and all client time
- Maintain Client Staffing (lead) and org chart alongside Office Manager

Human Resources

- Assist in mitigating and/or hearing staff/management grievances, complaints, or conflict resolution processes as necessary
    - Documentation
    - Follow through
    - Improvement plans
- Conduct exit interviews
- Assist Office Manager to conduct new employee orientation, verify I-9 documentation, create new personnel files, complete documentation, add to state database
- Assist with set up of new staff email

- Assist Office Manager to collect reviews and compile and save information for reviews
- Assist Office Manager to set up interviews, provide forms and follow up, reach out to references, create offers and send thank yous for interviews
- Check ins with all new employees weeks 1, 2 and 3
- Documented, scheduled 15-minute check ins with all staff every 30-45 days
- Plan “all staff” and strategic planning meetings
- Coordinate management team meetings/agenda

Experience/Qualifications:

- 5-7 years relevant experience
- Bachelor's degree or equivalent work experience
- Prefer development experience working with nonprofit organization(s); private and public sector
- Self-starter with strong attention to detail, problem solving skills, and demonstrated ability to be flexible in work assignments
- Proven organizational skills including the ability to multi-task, prioritize assignments, maintain data maintenance systems, and meet multiple deadlines
- Excellent writing/editing/drafting skills, research, and information compilation skills
- Excellent interpersonal communication skills, demonstrated ability to work independently as well as with teams
- Excellent computer skills: Microsoft Office Suite