



## Job Description

- **Title:** Philanthropic Services Officer
- **Classification:** Full-time, exempt
- **Department:** Advancement and Philanthropic Services
- **Location:** Beverly, MA
- **Position Type:** In-office 5 days per week

## About ECCF

[Essex County Community Foundation \(ECCF\)](#) envisions a resilient Essex County where, together, we all thrive. We are seeking a skilled **Philanthropic Services Officer** to join a talented, experienced, and energetic team.

**Essex County Community Foundation (ECCF) stands with our community, sparking generosity and collaboration to address our greatest needs and unlock opportunities for all – today and tomorrow.** We do this in three vital ways: 1) Managing and investing donor’s charitable assets; 2) Strengthening and supporting local nonprofits with the knowledge and financial resources needed to sustain lasting impact; 3) Bringing organizations together to invest in “systems-change” work that addresses root-causes of social issues in our region.

## The Employment Opportunity

The Philanthropic Services Officer is an essential member of the growing Asset Development and Philanthropic Services Team. This position will focus on three core goals: 1) build and manage relationships and provide support to donor-advised and scholarship fundholders, 2) manage projects and processes in support of the Asset Development and Philanthropic Services team, and 3) manage ECCF’s scholarship program. We seek a professional, self-directed, detail-oriented team player to join a dynamic, energetic, and high-performing team.

### **Fundholder Engagement**

- Proactively build and manage relationships with a portfolio of 75+ donor-advised fund and scholarship fundholders.
- Provide responsive and professional technical support and customer service as the go-to contact for fundholders.
- Facilitate the fund opening process for all fund types and onboard new fundholders.

### **Philanthropic Services Program Management:**

- Co-create and manage newsletter development and other communication and event strategies as defined by the Director of Philanthropic Services.
- Update and maintain accurate fundholder records in CRM; including moves management, succession plans, planned gifts, fundholder engagement, meaningful conversations, relationship notes etc. Ensure timely and accurate entry of activities and generate reports as needed.
- Co-create and, at times, own projects related to fundholder stewardship and impact on the direction of the Director of Philanthropic Services. Examples include the annual Giving Guide and annual Giving Impact Report.
- Co-create, manage, and collaborate across ECCF to facilitate high-quality fundholder events, experiences, and learning opportunities.
- Manage key program processes to resolve gift and grant issues with donors, following up on stale grant checks, executing action plans for inactive and low balance funds etc.

### **Asset Development Support:**

- Support Director of Strategic Giving to build new and steward current relationships with professional advisors (prospecting, outreach, CRM management, communications support).
- Support departmental and organizational events (virtual and in-person) and represent ECCF in the community.

### **Manage Scholarship Program:**

- Responsible for the scholarship program from start to finish; process new scholarship fund agreements, manage donor relationships and advise on

scholarship strategies, ensure processes are compliance with IRS regulations, and maintain accurate records of all scholarship activities.

- Manage the scholarship process in C-Suite database; track donor information, manage committee details etc.
- In cooperation with the Finance Department, process scholarship payments (300+ a year) and maintain recipient data. Generate detailed reports as needed.
- Maintain relationships with scholarship administrators and guidance departments of Essex County high schools and bursar offices of local secondary educational institutions.
- Act as point person for all inquiries from scholarship recipients.

### **Other Duties and Responsibilities**

- Individuals assigned to this position may perform other duties as assigned.

### **Qualifications needed for position**

- College degree or equivalent experience required.
- Minimum of three-five years of work-related experience, including working directly with HNW individuals in customer and/or donor service.
- Familiarity and experience within a non-profit setting is preferred. Extra preference for experience in fundraising, philanthropy, and/or working with scholarships.
- Alignment with the ECCF's mission and values.
- A commitment to racial equity and inclusion.

### **Skills, Abilities, Competencies**

- A team-oriented self-starter with a professional and mature interpersonal style.
- Ready to join a high-energy, fun, and entrepreneurial team and organization.
- Demonstrated ability to interact well with a diverse range of people and a natural curiosity and talent for making meaningful connections.
- Strong organizational and project management skills. Able to manage complex systems and multiple deadlines.
- Demonstrated ability to build and maintain relationships and provide high quality customer services.
- Excellent written and verbal communication skills to interact with donors, partners, and internal stakeholders.
- Proficient in database management systems to maintain accurate donor and scholarship records.

- Impeccable attention to detail and accuracy.
- Ability to operate with the highest level of integrity and able to handle confidential matters in a discreet manner.
- Strong knowledge of Zoom and Microsoft Office products.

**Working Conditions & Physical Demands:**

- Ability to work at workstation for long periods of time.
- Ability to work on site and remotely, as required.
- Ability to use a keyboard for extended periods of time.

**Compensation/Benefits**

This position is a professional, full-time staff position with an opportunity for future growth and will be eligible to participate in the Foundation's health plan, retirement plan and other employee benefits. The salary range is \$60,000 - \$75,000 and is commensurate with skill level, experience, and sector benchmarks.

Essex County Community Foundation is an equal opportunity employer and committed to creating a diverse, equitable and inclusive organization.

**How to apply**

Qualified candidates are encouraged to submit a cover letter and a resume to [hr@eccf.org](mailto:hr@eccf.org)  
Applications will be accepted until the position is filled.