

Relationship Officer

Community Shelter Board is a nationally recognized, award-winning non-profit organization working to end homelessness in Columbus and Franklin County. We are seeking a professional, self-motivated individual with a proven track record of stewarding long-term relationships and securing financial resources to serve as our Relationship Officer. S/he will enhance strategies and systems for raising dollars from individual donors to meet a specific personal revenue goal. S/he will have the opportunity to work in a fun, supportive fast-paced environment in this full-time position. Multi-tasking, prioritizing and excellent written and verbal communication skills are key. A successful candidate must be engaging, ambitious, and driven to exceed goals. You must like to raise money.

CSB offers a competitive salary, an excellent benefit program including health, dental, and vision insurance coverage, life insurance, 401(k) plan and employer retirement plan, flexible spending accounts, and generous paid time off. We also offer an attractive, comfortable work setting and free parking. Learn more about CSB at www.csb.org. Interested applicants should submit résumé and cover letter to [hiring@csb.org](mailto: hiring@csb.org) by December 21, 2018. EEO. Diverse applicants are encouraged to apply.

Title of Position: Relationship Officer

Salary Range: \$50,000 – 65,000

Status: Non-exempt, Full-time

Benefits: Health, dental, vision, life, disability, retirement plan, Section 125 benefits plan, and paid leave.

Reports to: Development Director

Unit: Relationships & Revenue

BASIC FUNCTION

This position is responsible for working with the Development Director to implement the overall development and communications strategy for the organization. Builds relationships and provides primary project and process management in all areas of Development and Communications.

EFFECT ON END RESULTS

This position is primarily concerned with the achievement of the goals for the organization by ensuring there is sound planning for, and the securing of, philanthropic and public resources for the long and short term future of the organization.

ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Leads the individual giving program (CSB Leadership Society) with plan and materials development, communications and reports. Schedules visits and meets with Leadership Society members, including tours. Plans and manages Leadership Society events and creates quarterly newsletter.
 - a. Develop a relationship plan for both current members and prospects
 - b. Engage members through phone calls, visits, tours and events and follow up with outstanding donors
 - c. Plan 4 Leadership Society exclusive events per year
 - d. Maintain a 95% renewal rate
 - e. Increase membership

**The Community Shelter Board is an Equal Opportunity employer
and conforms to all applicable employment practices.**

Community Shelter Board
Working to end homelessness

2. Leads the Women Leaders program with plan and materials development, communications and reports. Schedules and supports events including home events, tours and meal servings.
 - a. Develop a relationship plan for recruiting members
 - i. Increase membership through annual recruitment event
 - b. Engage and support members through phone calls, emails, visits and events with goal of maintaining 95% of gifts.
 - c. Work with leadership and event host committee on annual recruitment event.
3. Seeks, identifies and pre-disposes donor prospects.
 - a. Offer visits to 100% current mid-sized corporate donors \$1,000 and up and visit with 60%, five current donors increase their gifts
 - b. Meet with new mid-sized prospects and secure new gifts
 - c. Maintain a 90% renewal rate of current gifts
4. Leads the Legacy Giving program (planned giving) with plan and materials development, communications and reports. Schedules visits and meets with Legacy Society members, including tours.
 - a. Implement relationship plan for planned giving, including assisting in development of communication pieces and forms
 - b. Build program with close relationships
5. Leads the Giving Hall of Fame (loyalty giving) with plan and materials development, communications and reports. Schedules visits and meets with members, including tours.
 - a. Develop relationship plan for families and individuals who have been investing over the years
 - b. Develop special recognition opportunities for these individuals and families
6. Prepares correspondence, supporting materials, and other written communications necessary to support donor development and solicitation.
 - a. Assist in developing needed materials in a timely manner
 - b. Manage the appropriate review process when needed
7. Supports the trustee fundraising campaign with materials development, communications and reports.
8. Manages annual Wine, Women and Shoes event, with focus on revenue
 - a. Coordinate with event co-chairs and committee to ensure revenue goals are met
 - b. Lead effort to secure new and existing sponsors and move existing support levels up whenever possible
 - c. Ensure event stays within budget in conjunction with Development Coordinator
 - d. Coordinate third annual event attendance of 400
9. Coordinate outreach to sponsors for annual Under One Roof event
 - a. Coordinate with revenue committee to ensure fundraising goals are met
 - b. Lead efforts on identifying and securing new prospects to achieve revenue goals
 - c. Maintain timeline for ask letters, outreach, and check in with other fundraising team members on their sponsor relationships to ensure CSB secures all necessary high level sponsors in advance of all invitation print deadlines
10. Manages tour logistics with partner agencies.
 - a. Coordinate tours for LS members and Women Leaders
 - b. Coordinate tours for appropriate Mid-Sized organizations
11. Maintains donor profiles and information in donor database, pulls basic information and reports.
 - a. Follow proper procedures for Raiser's Edge
 - b. Helps with gift batch processing during times of peak volume
12. Works with the Relationship Coordinator and Development Associate to engage identified prospects from the CSB donor base and new prospects.
13. Manages self and position responsibilities in a manner which is congruent with CSB values, mission, policies and procedures.

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- a. Maintain confidentiality and discretion
Maintain good, professional relationships with CSB staff and others

OTHER FUNCTIONS

1. Participates in public speaking opportunities, as requested.
2. Assists with Board relations, as assigned, in partnership with the Development Director.
3. Provides back-up staffing for Development Director, Community Relations Director, Relationship Coordinator, and Development Coordinator.
4. Assures that effective communications are maintained within areas of responsibility. Participates in staff meetings.
5. Consults with all areas of organizational management responsible for policy or actions.
6. Recommends and implements techniques to improve productivity, increase efficiencies, cut costs, take advantage of opportunities and implement state-of-the-art practices.
7. Keeps abreast of current trends and practices in field of expertise.
8. Other duties as assigned.
9. Contributes to an atmosphere of dignity, respect, and diversity, and adhere to CSB's Code of Conduct. Ensures equal treatment of others without regard to race, religion, color, national origin, ethnicity, ancestry, sex, sexual orientation, gender identity and expression, age, disability, veteran status, familial status, or socio-economic status.

KEY LEADERSHIP COMPETENCIES

1. Communicates a compelling and inspired vision or sense of core purpose, is optimistic, makes the vision shareable by everyone.
2. Is effective inside and outside the organization, on both cool data and hot and controversial topics; can change tactics midstream when something isn't working.
3. Can learn new skills and knowledge and picks up on technical things quickly.
4. Can accurately plan projects/tasks with regards to length and difficulty. Can set objectives and goals and anticipate and plan for roadblocks.
5. Can establish processes in order to work efficiently.
6. Can handle stress and changing situations with composure.
7. Establishes and maintains effective relationships with customers and gains their trust and respect and is dedicated to meeting their expectations and requirement.
8. Can make decisions without having the total picture. Is comfortable handling uncertain situations.

SKILLS, KNOWLEDGE & ABILITIES

1. Positive attitude for raising funds to achieve impact.
2. Excellence and aptitude in major gift fundraising.
3. Proven competency in written and oral communication skills required.
4. Proven experience working with fundraising volunteers.
5. Fluency in word-processing, spreadsheet, and database management necessary; experience in development and communications database preferred.
6. Proven ability to work independently, manage deadlines.
7. Demonstrated ability to accurately attend to detail; ability to manage large amounts of information effectively.
8. Excellent time management, organization and project and process management skills.
9. Well-developed interpersonal skills; ability to work with diverse personalities; tactful, mature, flexible, accountable, dependable, team-oriented.

PHYSICAL OR MENTAL DEMANDS

1. High energy level, comfortable performing multi-faceted projects in conjunction with normal activities.
2. Quick learner - Ability to multi-task and maintain/oversee multiple projects simultaneously.
3. Ability to establish credibility and be decisive but able to recognize and support the agency's needs and priorities.

MINIMUM QUALIFICATIONS

1. Congruence with and passion for agency mission and values.
2. At minimum three to five years development, communications, customer service, or sales experience.
3. Valid Ohio driver's license, proof of automobile insurance, and pass a criminal background check.
4. Experience working with or on behalf of homeless and other disadvantaged populations preferred.