



## Job Description

Position Title: Donor Relations Officer, Donor Advised Funds

Department: Development and Donor Relations

Reports To: Director of Donor Relations

Position Status: FT / Exempt / Oahu Based

Date: April 2025

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### HCF's Collaboration Philosophy

At the Hawai'i Community Foundation (HCF), we believe that an organization's team as a "whole is greater than the sum of its parts" (Aristotle). To us, this means that we are committed to be a collaborative 'ohana (family) that lives and actionizes our mission, respects and cares for each other, and innovates and learns together. We understand that we must rely upon all our individual strengths as we partner to provide excellent value and achieve effective results for our generous donors, community partners, and all of Hawai'i's people.

### Position Summary

Like all HCF team members and volunteers, the Donor Relations Officer exudes the **heart and passion** for HCF's mission: to inspire generosity, advocate for equity, forge connections and invest in community to create a better Hawai'i. Specifically, the Donor Relations Officer is a key member of a comprehensive donor relations program within Development and Donor Relations (DDR) department that enhances the donor experience, promotes engagement, and ensures that gifts are used in a timely and appropriate manner.

This role's primary purpose is to work closely with the Director of Donor Relations to implement and coordinate comprehensive management of donors who have established Donor Advised Funds (DAFs) at HCF. This is a crucial and core service of the Foundation, requiring superior donor relations skills, accuracy, and reliability. This donor constituency has an ongoing relationship with HCF and with the organizations where the donor allocates funds. Working with the Director of Donor Relations, this position stewards and responds to the needs of Oahu donors and provides the finest donor experience.

### Essential Position Responsibilities

Key responsibilities fall within primary areas of focus and are as follows.

#### *Strategic Donor Stewardship*

- Participate in the DDR-wide operating plan for Donor Relations and Donor Services to develop and implement a strategic donor stewardship plan for

donor advised fund donors that appropriately acknowledges and stewards all gifts and recognizes and engages donors with a strong emphasis on major gifts.

- In collaboration with the other members of the team, implement strategies to enable a high-quality donor experience through responsive, proactive and efficient donor service and engagement, including communications, reporting and operational processes.

#### *Fund Administration*

- Ensure compliance with fund administration policies and best practices in stewardship procedures and standards.
- Serve as the means by which the donor achieves philanthropic goals.
- Collaborating with Finance, ensure accurate fund reporting in writing and/or by personal interaction with the donor. Ensure accurate allocation of funds with the Finance team.
- Demonstrate proficiency at all aspects of the CRM database, including but not limited to data entry and report generation, with the ability to manipulate data and create reports and mailing lists, record all gift information and maintain communication records with donors.
- Develop criteria for measuring stewardship and retention success, track and evaluate results, and advise leadership of on-going progress and recommend actions.
- Conduct ongoing analysis of donor engagement to ensure they are receiving effective, appropriate, and engaging stewardship.

#### *Donor Engagement and Gift Impact*

- Manage a portfolio of DAFs as assigned by the Director of Donor Relations.
- Oversee timely and accurate reporting to DAF donors, as well as to donors of other fund types such as Field of Interest and Designated Funds.
- Participate in stewardship policy and practice to ensure donor funds are spent appropriately and donors are kept well-informed about the use and impact of their gifts.
- Identify opportunities to introduce DAF donors to other HCF giving opportunities as appropriate.
- Ensure this constituency of donors is included in all appropriate communication, acknowledgement, and engagement activity at the Foundation.
- Facilitate internal collaboration on development of digital and print communication opportunities to connect with donors.
- Conceptualize, draft and prepare briefing materials for donor and prospect visits.

#### *HCF and Community Knowledge*

- Develop knowledge and awareness on community issues, nonprofit organizations, and community leaders as they relate to HCF's priorities.
- Respond to inquiries from the public and non-profit organizations.

- Collaborate with all members of DDR to create holistic service to donors at HCF.
- Crosstrain to minimize disruption during times of absence.

#### *Other Responsibilities*

- Serve as a knowledgeable and collaborative representative of HCF in the community
- Partner collaboratively with other staff members to ensure effective outcomes
- Perform other tasks as assigned.

#### **Position Requirements**

HCF believes in ensuring that our team members are capable of thriving in their positions. Accordingly, the Donor Relations officer must possess the following knowledge, skills, abilities, experience, and education:

- Bachelor's degree from an accredited institution required
- Minimum three years in direct and varied areas of stewardship, development or alumni relations required.
- Demonstrated skills, knowledge and experience in the design and execution of stewardship and donor relations activities required
- Professional experience in development and working with donors preferred
- Demonstrated passion for the betterment of Hawaii and its people
- Knowledge, sensitivity, and understanding of the history and complexities of Hawaii's multicultural community
- Capable of thriving in a highly collaborative and flexible organization with an appreciation and respect for colleagues of diverse backgrounds and perspectives and an enthusiasm to continually shift and evolve to meet the needs of the community, clients, and donors.
- Self-motivated strategic thinker with a proven record working independently and achieving results.
- Exceptional interpersonal skills including the ability to communicate effectively with varied constituents including government officials, business and nonprofit leaders, and donors.
- Ability to be extremely discreet in working with or having knowledge of sensitive or confidential information related to client and donor information, relationships, and funds.
- Ability to compose professional level correspondence including the ability to synthesize information and compose clear and effective materials with excellent proofreading skills and command of language, grammar, spelling, and punctuation.
- High proficiency in project management, attention to detail, ability to quickly understand and remember details about donors and projects to which they are assigned, prioritization of work and organizational skills required.
- High level of competency in computer programs, web-based content management systems and applications, and digital/social media platforms.
- Intermediate knowledge of Microsoft Office, specifically Word and Excel, database software and spreadsheet programs, email, and Internet applications.

#### **Work Environment, Physical, and Mental Demands**

- Works under regular office conditions with the ability to work remotely for extended periods of time.
- General office hours are Monday through Friday, 8:00 am to 5:00 pm, with

- flexibility per needs of the business
- Required to travel as needed
- Ability to operate general office equipment including computer, copier, printers, etc.
- Ability to lift, carry, push, pull, up to 25 lbs. of general office material or equipment

This provides a general description of the common duties performed by a person in this position. It does not include every possible duty an individual in this position may be asked to perform and is not all-encompassing. Positions also may require “other duties as assigned” and such assignments are considered part of this position’s assignment. This job description is provided as a general summary and does not constitute a contract for employment and does not in any way alter Hawai`i Community Foundation’s employment “at-will” relationship with any employee in this position.

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Employee’s Signature

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Date

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Supervisor’s Signature

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Date

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Annual Position Salary Range: \$68,600 - \$102,900