



Relationship Officer

Who We Are

Family Tree Clinic is a leader in sexual and reproductive health care in the Twin Cities and Minnesota. Founded by community activists and volunteers in 1971, our vision is to eliminate health disparities through innovative, personalized sexual health care and education for diverse needs. We work to achieve this vision through providing patient-centered health care services, community education and outreach, and through developing alliances across the state to promote sexual health and freedom in our communities. The staff at Family Tree is a team of committed, passionate, and smart individuals who work hard and are eager to learn and grow together as we provide services and education to our community.

Core Value Statements

Commitment to furthering social and reproductive justice: striving for and demonstrating a conscious awareness of cultural markers and lenses related (but not limited) to race, ethnicity, country of origin, religion, family narrative, gender identity, immigration status, gender presentation and expression, sexual orientation and expression, mental and physical ability, size, class, and age; sex positive; striving to center justice lenses in our daily work and long-term goals

Mission-focused: conveying passion for our mission with an understanding that our work evolves over time, and that there are many ways we accomplish our collective goals; supporting a workplace environment that is in service to our mission

Collaborative and accountable: being mindful of our differences and striving for self-awareness; accountable to colleagues, patients, clients and community members; acknowledging of one's own mistakes and striving to learn from them; supportive of ongoing learning

Direct and respectful: being honest, candid and straight-forward in a way that acknowledges the power of our words; assuming the best intentions when engaged in difficult conversations; conveying respect for each other and our clients; upholding workplace standards and Family Tree's mission in all of our interactions

Position Summary

The Relationship Officer is responsible for cultivating, soliciting, and stewarding relationships with individual donors to advance the mission of Family Tree Clinic. This role focuses on building and maintaining a diverse portfolio of donors, while expanding Family Tree's individual donor base and supporting annual fund giving initiatives.

The Relationship Officer collaborates with the Director of Advancement and other Advancement staff to design and implement donor engagement strategies and ensure effective donor relationship

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management. This position also helps manage donor data systems (NeonCRM), enhances fundraising operations, and contributions to campaign and event planning and execution.

The Relationship Officer is an essential member of the Advancement Department and reports to the Director of Advancement.

Primary Duties

Donor Relationship Management: Help build and manage a diverse portfolio of individual donors, with a focus on mid-tier donors. Develop personalized strategies to engage and steward donors at all levels.

Recurring Donor Program: Oversee Evergreen, Family Tree's recurring donor program, contributing to its growth through targeted donor engagement and retention strategies.

Collaborative Fundraising: Partner with the Director of Advancement to support donor relationship management, moves management, and gift solicitation. Collaborate on donor engagement initiatives and fundraising campaigns supporting the annual fund.

Expand Donor Base: Develop creative strategies for identifying, qualifying, and soliciting new donor prospects to expand Family Tree's donor base.

Appeals and Campaigns: Collaborate with the full Advancement team to help develop and execute engaging and impactful fundraising strategies, including mailed and electronic appeals and campaigns such as Give to the Max Day. Responsibilities include crafting appeals, securing sponsorships, and acknowledging donations.

Data and CRM Management: Maintain accurate donor records and utilize the CRM to:

- Retrieve donor data and generate reports
- Enter timely updates on donor interactions
- Leverage analytics tools like wealth screening and email marketing insights

Fundraising Operations: Support the Director of Advancement and Development Manager in refining processes for gift accounting, acknowledgement, and reporting.

Event Planning and Execution: Assist in planning and hosting donor engagement and stewardship activities, such as community events, tours, and fundraising initiatives. Represent Family Tree in public settings to enhance community presence.

Annual Fund Plan Implementation: Collaborate with the Director of Advancement to execute the annual fund plan and undertake additional duties as assigned.

Independent responsibilities

- Donor prospecting and stewardship at all levels of individual giving, with a focus on mid-tier donors

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- Portfolio management; ensuring a personalized and impactful donor experience
- Leading the Evergreen recurring giving program
- CRM and donor data management
- Preparing fundraising appeals
- Serve on the Board Fund Development Committee
- Keep current with fundraising community and trends

Collaborative responsibilities

- Strategic fund development planning
- Team collaboration on annual fundraising campaigns
- Operational support to enhance processes for gift acknowledgement
- Event planning, coordination, and execution
- Programmatic alignment - engaging department directors to assess departmental needs and gather programmatic data for donor impact reports and proposals
- CRM optimization for greater efficiency and strategic decision-making
- Support to the Director of Advancement and Executive Director in managing major donor relationships, such as preparing reports and scheduling meetings
- Provide support for the Fund Development Committee of the board, such as preparing documents, taking minutes, and scheduling meetings
- Maintain status of Charities Review Council, HRC Healthcare Equality Index, Candid, and other independent seals
- Assist with aligning Family Tree's development efforts with organizational values and community-centric fundraising principles.

Additional duties

Perform additional tasks and responsibilities as assigned.

Qualifications

Required

- Minimum of 3 years in fundraising, donor relations, or a similar development role
- Proven ability to manage donor relationships, with demonstrated success meeting fundraising goals
- Excellent interpersonal and written and verbal communication skills with a variety of people, including 1:1 conversations, public speaking, and writing compelling appeals
- Proficiency in donor database management (e.g., CRM systems, NeonCRM preferred)
- Strong organizational skills with the ability to manage multiple projects and deadlines
- Self-motivated with the ability to work independently and collaboratively in a team-oriented environment
- Strong relationship-building skills and a community-centric approach to fundraising
- Experience with Google and Microsoft office products and applications
- Ability to maintain confidential records and information
- Knowledge of fundraising trends, best practices, and principles - including ethical standards

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- Ability and willingness to challenge and change systemic and personal actions and behaviors that contribute to systems of oppression
- Commitment to reproductive justice, racial justice, gender justice, LGBTQ equity, trans equity, and sexual health care and education

Preferred:

- Bachelor's degree in a related field or equivalent education or certification
- Experience managing annual giving programs, donor engagement campaigns, and/or planning and executing donor events or stewardship initiatives
- Familiarity with nonprofit budgeting and financial documents
- Familiarity with data analysis and metrics for evaluating fundraising effectiveness

Reporting Relationship

This position reports to the Director of Advancement.

Salary & Benefits

Hourly pay rate is \$28.00 - \$33.00, depending on qualifications. This is a benefits-eligible position, with paid holiday, vacation and sick time, and 2% employer matched 401k.

Full time benefits include medical insurance, dental insurance, vision insurance, life insurance, long-term disability insurance and free parking.

Hours

40 hours per week, Monday - Friday. Occasional nights and weekends required.

Typical Working Conditions

- Conditions typical to an office environment including sitting or standing at workstation and in meetings, viewing computer screens, lifting up to 30 pounds.
- All Advancement staff at Family Tree work one, two-hour long shift at our welcome desk each week (included in the normal 40 hours), plus two Saturdays per year. This requires sitting at a workstation and also greeting visitors to Family Tree Clinic.
- Occasional need to travel or work off-site, such as tabling and attending events
- This position is expected to work on-site in a clinical & office environment with some remote work flexibility.
- Hazards common to clinical and educational environments including potential exposure to communicable diseases.

To Apply: Please submit a resume and cover letter via email to Annie Schmitz, Director of Advancement, at aschmitz@familytreeclinic.org.

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