



Position Title: Donor Services Associate / Development Associate

Reports To: Director of Development

The Donor Services Associate helps fulfill the mission of POISE Foundation as a member of the Development Team. The position is the frontline contact for transactional work with new and existing donors to the Foundation. The Donor Service Associate will work closely with new and existing donors who have established a fund at POISE , as well as serve as the key administrative resource for database management and internal processes for new fund creation. The position works primarily with donors, their grantees, and Foundation staff and reports directly to the Director of Development.

RESPONSIBILITIES

Donor Services Support

- Produce all donor acknowledgement letters through the Foundation's CRM system and collaborates with Director of Development to identify and generate special donor acknowledgments as needed
- Process gift contributions, special gifts, stocks, and others. Work closely with the Director of Development to monitor and ensure the accuracy of gift and donor information entry to CRM system
- Provide administrative support for year-end giving campaigns, workplace giving matching programs, and other individual giving efforts
- Manage donor database, including name and address changes, and donor and prospect demographic information
- Deliver quality customer service to various constituencies. Monitor Development Department email account and respond to inquiries promptly and professionally
- Provide monthly reports on fundraising goals (tracking donations to solicit and close, year-to-date totals, etc.); work with the Development team to identify data needs
- Provide administrative support for direct mail and email campaigns soliciting donations from individuals
- Assist with individual donor cultivation and retention activities

Fund Advisor Management

- Serve as the administrative contact for all fund advisors
- Maintain and manage fund advisor portal including customizations, password resets, updating information and Foundation messaging

- Provide excellent customer service, including promptly replying to queries and following up on administrative details
- Assist Director of Development with drafting and executing donor and fund holder agreements, including the creation and maintenance of donor profiles in the CRM System
- Serve as the primary staff for managing the transactional elements of grant recommendations from fund advisors, including assisting donors with navigation of the fund advisor portal
- Manage the fund advisor grant process in partnership with grantmaking staff
- Provide administrative support to the Director of Development as he/she works with fund advisors on maintaining and growing their fund(s)
- Prepare analytical reports related to individual giving campaigns
- Assist the Director of Development in preparing and sending donor communications, regarding new fund creation, fund updates, gifts, grants, and fund balance statements

Other Duties

- Positively contribute to the teamwork, learning and collaborative spirit of a small office
- Perform other duties as assigned

Essential Skills, Knowledge & Ability:

- A minimum of a Bachelor's Degree and at least three years of relevant experience.
- Advanced skills in accounting and Customer Relationship Management (CRM) System (Community Suite).
- Comfortable dealing with donors and partners who represent a wide range of socio/economic backgrounds.
- Ability to work in a small, team-oriented environment and experience with collaborative efforts
- Ability to successfully manage multiple assignments independently.
- Ability to manage time efficiently, meet deadlines, and work independently.
- Excellent oral, writing and analytical skills.
- Very strong organizational and detail orientation skills
- Demonstrated success multi-tasking in a deadline-driven environment while keeping others well-informed
- Must have an inquisitive, investigative mindset, and be willing and able to “dig deeper,” rather than accept information at face value
- Advanced skills with MS Office Suite programs.
- Quick learner, self-driven and able to work independently within a short period.
- Applies creativity and good judgement in addressing donor and nonprofit related issues in a professional manner.

TO APPLY: <https://www.indeedjobs.com/poise-foundation/jobs/f4089ab4b338b4cd38a8>