

## **JOB DESCRIPTION**

### **DONOR SERVICES ASSOCIATE**

**Classification:** Office

**Department:** Development Office

**Reports to:** Director of Development

#### **Summary / Objective**

This position provides strategic administrative support to the department's current and future fundraising activities and initiatives including donor and public relations, direct and electronic mail appeals, capital campaign, special events and social media. Its primary duties are responsibility for donor database management, donor relations, communications, administration, research and tours. A defined relationship with the finance department for gift deposits occurs daily, accounted for monthly and reported annually.

Responsibilities for this position demonstrate the capacity to:

1. Organize and complete multiple projects simultaneously and on time
2. Pay attention to detail
3. Embrace monastic values and mission and department goals
4. Prioritize projects to meet deadlines.

Donor relationships are paramount. They underpin the monastery's vision and mission. The array of multiple donor support services delivered insure good stewardship, never taking it for granted and always being accountable.

#### **Essential Job Functions**

##### **Donor Data Entry and Maintenance 30%**

- Enters all donor data from checks, correspondence, and online transactions into donor database on a daily basis and maintains accurate hard copy and electronic files
- Monitors and prepares an array of detailed donor reports for director and field staff
- Updates donor contact information to ensure accuracy
- Reconciles department's gifts with Finance on a monthly basis
- Creates acknowledgments, receipts, and notifications for donors and prospects
- Increases knowledge base of donor management system through available resources
- Sends out all thank you letters within 48 hours and annual tax receipts
- Prepare all board and director Capital Campaign financial reports, materials, minutes and all committee communications.

### Donor Relations and Communications 30%

- Provides donor resource support for director while out of the office including various reports and correspondence, especially related to the Capital Campaign
- Responds to donor inquiries in a prompt and courteous manner
- Administers the department's master calendar for print, email, social media and an array of data file reports for multiple uses.
- Preserves donor confidentially and ensures compliance with related policies
- Creates and maintains an office filing system, including annually archiving documents
- Interact professionally with donors, guests, advisory board, staff, docents, and tour groups, as well as demonstrates good judgment.

### Administration and Research 30%

- Handles the Abbey's message center, answers the phone and distributes messages, as needed
- Provides all Capital Campaign fundraising reports and correspondence, including pledge and gift income tracking and accountability records.
- Provide data support for Donor Relations Officer, as needed
- Prepare research profiles for wealth screening to identify major and high-level annual gift prospects, as requested.
- Identify, create and monitor giving reports to determine the patterns and trends for monthly, major and annual fund giving.
- Monitor contact and create internal giving reports for potential new prospects for major and annual fund giving
- Prepare donor-briefing profiles for scheduled donor visits.

### Abbey Tours 10%

- Coordinate and schedule Abbey tours with docents.
- Create a recruitment and training schedule for new docents.
- Accountability for tour donations.

### Other Duties as Assigned

### **Qualifications**

- Education: B.A. preferred or equivalent experience
- Three to five years of administrative experience – Non-Profit, faith-based a plus
- Track record and working knowledge of databases and/or sales management platforms (CRM), MS Office Suite, Google Platform (Drive, Calendar, Mail), Donor Perfect and Adobe InDesign a plus
- Research Experience, Problem Solving/Analysis
- Experience in data mining
- Good verbal and written communication skills

- Self-starter, working and making sound decisions independently and as team member
- Demonstrated excellence in organizational ability to complete multiple tasks simultaneously, attend to detail and prioritize projects to meet deadlines
- Proficient in building strong relationships, demonstrating initiative and taking responsibility
- Collaborative, dependable and resourceful. Ability to work with minimum supervision.

### **Competencies**

1. Respects and embodies the values of monastic community.
2. Possess critical thinking skills, be detail oriented and demonstrate research capacity interest
3. Professional Conduct
4. Maintain Confidentiality
5. Ability to communicate effectively with others, initiate and follow-up with conversations.

### **Supervisory Responsibility**

This position has no supervisory responsibilities.

### **Work Environment**

This position requires some local travel and knowledge of printers, computers and scanners.

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to perform successfully the essential functions of this job.

While performing the duties of this job, the employee is regularly required to listen and communicate.

### **Position Type / Expected Hours of Work**

This hourly, full time position may require a flexible work schedule. Hours of work are Monday through Friday, 8:30 a.m. to 5:00 p.m. with a 30-minute lunch and two, 15-minute breaks during the day.