FREMONT AREA COMMUNITY FOUNDATION

Job Description

Job title: Philanthropic Services Associate
Reports to: Director of Philanthropic Services
FLSA status: Salaried - Exempt

General Summary

The Philanthropic Services Associate supports the philanthropic services team through accurate, timely administration of fund and donor records. Responsibilities include entering and maintaining data in the donor database, processing fund transactions, maintaining fund and donor records, preparing reports, managing documents, and monitoring data quality to keep information accurate and consistent. The role also supports fundholders and affiliate funds by ensuring their records and transactions are handled correctly and on schedule.

Principal Duties and Responsibilities (These are intended to describe the general requirements for the performance of this job. It is not intended to be an exhaustive statement of duties, responsibilities, or requirements. All duties are to be performed in accordance with established Community Foundation policies, standards, and protocols.)

Data Entry and Information Management Systems

1. Provide technical assistance for online resources available to fund representatives to enhance user experience.

2. Maintain recordkeeping and filing systems for philanthropic services team members.

3. Assist with data entry in the Community Foundation database for philanthropic services following established procedures and practices that ensure the accuracy and integrity of data input and output.

Stewardship and Cultivation

4. Assist the philanthropic services team in cultivating and expanding relationships with donors.

5. Manage relationships with nonprofit organizations that have endowed funds at the Community Foundation.

6. Assist philanthropic services team members to develop and maintain relationships with new and current fund representatives through phone calls, written correspondence, and personal contact.

7. Entering and maintaining donor, fund, organization, contact, and activity records. Reviewing records for accuracy and correcting duplicate or missing information.

8. Collaborate with staff to identify opportunities to expand the Community Foundation's influence in our communities and to enhance donor involvement and attract new donors.

9. Work closely with colleagues to provide high-impact stewardship through events and appropriate correspondence with donors and fund representatives to foster future support.

10. Assist with setting up new funds and work with the Philanthropic Services team to generate reports that help with identifying potential donors or current donors.

11. Identify and facilitate recognition opportunities for donors.

12. Analyze giving trends in consultation with philanthropic services team.

13. Track donor relations and stewardship activities in appropriate databases to strengthen relationships and increase the likelihood of continued contributions.

Fund Administration

14. Assist with donor services by collaborating with administrative team in verifying new fund agreements and maintaining fund files.

15. Respond to inquiries and follow up on requests from donors and fund representatives.

16. Ensure accurate records for all contacts with donors, prospects, and fund representatives.

17. Process fund and grant distribution requests for agency, designated, and donor advised funds.

18. Assist with the communication of regular fund statements and annual grant budgets to fund holders.

19. Verify new fund agreements and restrictions, including database entry and coding information.

Administrative

20. Provide general administrative support to philanthropic services and scholarship team members.

21. Assist with processing gifts and acknowledgements.

22. Prepare reports to support philanthropic services team. Generate queries, lists, and reports in the database.

23. Provide excellent customer service that anticipates and exceeds the needs of all donors, fund representatives, and community members.

Additional Duties

24. Attend community, grantee, and donor functions as Community Foundation representative.

25. Cover front desk reception duties for lunch and breaks as needed.

26. Limited travel within four-county service area.

27. Perform other duties as assigned.

Professional Development

28. Maintain current knowledge of philanthropy trends and legislation that affect donors and community foundations.

29. Keep current regarding trends and developments in community foundation administration as well as software applications through reading of professional literature and attendance at appropriate seminars, conferences, and workshops.

Knowledge, Skills, and Abilities Required

30. Completion of a bachelor's degree in related field, such as nonprofit management, public administration, or business administration.

31. Experience and knowledge of the nonprofit sector, including fundraising and grant making processes.

32. Superior organizational skills with attention to detail.

33. Experience with database entry and record maintenance, transaction processing, document-management systems, and Excel, with strong attention to detail, adherence to data-entry standards, routine system troubleshooting, and careful handling of confidential information.

34. High-level of integrity, professionalism, and strong work ethic.

35. High-level interpersonal skills necessary to work cooperatively with others and to interact effectively and courteously with a diverse group of donors, callers, and nonprofit representatives; must be socially perceptive in contacts with influential individuals.

36. Exercises a high level of thoughtful and insightful judgment within areas of accountability.

37. Knowledge and skill in utilizing Microsoft Office and other software applications.

38. Ability to handle confidential information in a professional manner.