

POSITION DESCRIPTION

DEVELOPMENT ASSOCIATE

POSITION SUMMARY

The Development Associate is primarily responsible for management of the Raiser's Edge database, entry and management of gifts, development of reports, supervision of Development Department volunteers and the provision of clerical and administrative support for the Chief Advancement Officer, Director of Development and others engaged in Development and donor relations activities.

Status: Full time, non exempt

REPORTING RELATIONSHIPS

The Development Associate reports to the Chief Advancement Officer and works directly with the Director of Development and other professionals and volunteers involved in fundraising, gift management, events and other Development functions and activities.

SPECIFIC RESPONSIBILITIES

1. **Development Program:** Provides clerical and general office support for the Development Office assisting in the successful implementation of Development programs including: capital, program and endowment campaigns, major gifts programs, planned giving programs, annual giving campaigns, direct mail, foundation and grants development, events and activities, donor and prospect relations and miscellaneous philanthropic activities.
2. **Database Management:** Serves as the primary manager of the Raiser's Edge database, correctly coding, entering and allocating gifts to appropriate constituencies, funds, divisions, campaigns and solicitation categories; prepares monthly Development report and other reports as requested; reconciles information with Finance on a monthly basis or more frequently as needed; and enters prospect, foundation, event, and other donor relations information as requested.
3. **Gift Receipt:** Enters all gifts and pledges into Raiser's Edge software; develops letters of gratitude, secures signatures and assures that all letters are correct and mailed within 48 hours of gift receipt.
4. **Gift Reports:** Extracts and prepares donor, gift and pledge reports including reports categorized by constituency, levels of giving, division, campaign, event, fund restrictions, pledges and payments on pledges, and other report designations deemed necessary.
5. **Donor Recognition:** Maintains a master list of donors for recognition; creates and assures that recognition lists are accurate and up-to date; prepares donor lists for Website and annual reports; and manages all other forms of donor recognition.

6. **Prospect Development:** Maintains accurate and up-to-date donor and prospect files; prepares forms and methods for monitoring donor, prospect, and solicitor activities; identifies major donor and planned giving prospects in database; researches prospects and suggests cultivation strategies; assists with preparation for prospect cultivation/solicitation meetings; and participates in prospect development activities as needed.
7. **Events:** Provides assistance to the Chief Advancement Officer, Director of Development and others involved in the planning and implementation of events as directed including the development of materials, coordination of schedules, management of arrangements; participates in meetings, creates reports, assists with activities before, during and after the event.
8. **Direct Mail:** Oversees direct mail processes working with volunteers and others to assure accurate and timely mailing procedures; creates mailing lists segmented according to criteria; manages and monitors the mailing process; and establishes methods for response management.
9. **Donor Stewardship:** With Chief Advancement Officer and Director of Development, supports various donor stewardship and donor appreciation activities such as lunches, meetings, preview activities for events, newsletters and other types of personal communications; addresses donor inquiries in a professional, courteous, and effective manner; and tracks and records donor relationship activities on prospect and donor records.
10. **Volunteer Coordination:** Provides instruction, supervision and support for volunteers involved in various Development activities including direct mail management, event preparation and participation, and other activities as needed; contacts and schedules volunteers as needed; recognizes volunteers for their contributions of time and talent.
11. **Meeting Management:** Schedules and coordinates various meetings as directed: makes arrangements, prepares materials, sends notices, makes calls as needed, prepares attendance lists and accurately writes and maintains records of minutes, agenda, supplementary and follow-up information and correspondence as appropriate.
12. **Constituent Relations:** Works with Board members, staff, volunteers, donors, prospects, consultants, advisors, and all others involved in Development activities in a professional and competent manner.
13. **Ethics & Professional Standards:** Maintains a professional demeanor in dress and behavior; treats all people with respect & dignity; maintains all donor and prospect information in the strictest confidence.

REQUIREMENTS

- Bachelor's degree, CRM training, or previous experience in relevant field.
- Experience with Raiser's Edge software is required. Knowledge or experience with *Givesmart* a plus,
- Expertise in Microsoft Office Suite, with emphasis on Word & Excel.
- Ability to understand and manipulate data for gift and donor analysis, list segmentation, and the preparation of various standard and customized Development and donor reports.
- Ability to develop intuitive queries and analyze data to create reports that support planning, monitoring and decision-making activities.

- Innate ability to identify prospects based on giving patterns including giving trends, interests and linkages to Surrey Mission, programs, and people.
- Demonstrated understanding of donor-centric fundraising.
- Ability to instruct and supervise volunteers and others to assure excellent outcomes and satisfying experiences.
- Critical-thinking skills, problem-solver, takes initiative; works well in a team and independently.
- Outstanding written and oral communication skills.
- Organized, detailed-oriented with emphasis on accuracy; able to work efficiently and meet deadlines.
- Excellent clerical and office operations skills.

DISCLAIMER

This position description is not designed to cover or contain a comprehensive listing of activities or responsibilities that are required of the employee. Additional duties and responsibilities expected to be performed as necessary.

An Equal Opportunity Employer

Surrey Services is an equal opportunity employer. This job description will not be used for limiting or excluding any applicant or employee from consideration for employment on a basis prohibited by local, state, or federal law.

To apply, please direct inquiries including cover and resume to the Human Resources Department at jobs@surreyservices.org.