

JOB DESCRIPTION

TITLE: Donor Services Associate - Foundation

DEPARTMENT: Donor Operations

REPORTS TO: Managing Director of Donor Operations

CLASSIFICATION: Full-time, Non-exempt

ORGANIZATIONAL OVERVIEW:

Jewish Federation of Greater Atlanta is a philanthropic and community champion, connecting metro Atlanta area Jews – of all ages, backgrounds, and perspectives – to our community’s power to improve the world. We partner with donors, organizations, and foundations to address the pressing issues facing our community, and to develop innovative strategies that result in deep and lasting impact locally, in Israel, and around the world. We envision a thriving and connected 21st century Jewish Atlanta where every Jew and their loved ones can access warm Jewish community, timeless Jewish wisdom, global Jewish peoplehood and Jewish ways to do good in the world.

Federation is continuing to build a team of highly motivated and qualified individuals with a variety of skill sets to create a new model of 21st century community engagement. We are seeking someone who is driven and passionate, and who demonstrates Federation’s commitment to our core values of excellence, fearlessness, empathy, collaboration, and a positive can-do attitude.

PRINCIPAL FUNCTIONS: The Atlanta Jewish Foundation manages close to \$400 million dollars in charitable assets. The Atlanta Jewish Foundation’s assets include those of individual philanthropists, prominent family foundations, and partner organizations. The Donor Services Associate is entrusted to empower the community’s philanthropists in their grantmaking through superior customer service and management of backend operations. Candidates should have strong customer service skills and attention to detail.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

DONOR RELATIONS AND CUSTOMER SERVICE

- Provide concierge service to the Atlanta Jewish Foundation’s philanthropists and respond to inquiries
 - Deliver high-touch service to key stakeholders and philanthropists, ensuring exceptional and personalized interaction
 - Facilitate the onboarding process for new major donors
 - Enhance customer satisfaction through effective problem-solving and communication skills
 - Engage and connect planned giving and DAF prospects with appropriate team members
- Guide donors to identify and support reputable charities
- Research new charitable organizations at the request of our fundholders
- Welcome new philanthropists and introduce them to the Foundation’s online portal
- Process incoming donations that are received via phone and email and tribute gifts
- Distribute charitable grants weekly



DONOR OPERATIONS

- Maintain philanthropic fiduciary database and CRM
- Grant submittal for restricted funds
- Code checks, wires and stocks
- Generate DAF agreements
- NAV updates
- Prepare and distribute monthly agency statements
- Prepare and distribute custom quarterly statements for the Foundation
- Set up new charities as needed
- Other duties as assigned

OTHER / OVERALL FEDERATION SUPPORT

- Serve as part of the team for answering incoming calls/checking Federation voicemail, directing callers to the appropriate Federation professional to ensure their questions are resolved if needed
- Provide superior customer service, communication, and quick response time to internal and external customers
- Develop positive relationships with colleagues, donors, tenants and community members
- Analyze and make suggestions to continually improve efficiency
- Maintain confidentiality of all donor and fundholder information
- Other duties as assigned

The above job duties and responsibilities describe the general nature and level of work for an employee in this position, but this is not intended as an exclusive or all-inclusive inventory of all duties required of employees in this job.

QUALIFICATIONS: Bachelor's degree or equivalent. Minimum 3 years of experience in a customer service role. Strong technology skills including experience with a CRM/data management system (we use Salesforce and Stellar), and proficiency with Word, Excel and Outlook. Flexible, collaborative, and comfortable multi-tasking effectively in a fast-paced environment. Strong planning and prioritization skills and excellent attention to detail. Proven track record of problem-solving and meeting deadlines. Excellent written and verbal communications skills. Strong interpersonal skills with the ability to positively and successfully interact with all members of the organization and external community. Good judgment and problem-solving skills. Exhibits a positive, collaborative, professional demeanor.

PHYSICAL REQUIREMENTS: Intermittent periods of standing and walking with extended periods of sitting. Must have excellent visual acuity for work with systems and records. Position requires average hearing and verbal ability to communicate with Federation staff, donors, volunteers, vendors, and others. The employee must occasionally lift and/or move up to ten pounds.

COMPENSATION: The salary range for this position is \$52,000 - \$60,000 plus a comprehensive benefits package. Anticipated salary near midpoint; commensurate with experience.



Jewish Federation
OF GREATER ATLANTA

Jewish Federation of Greater Atlanta provides equal employment opportunities to all applicants and prohibits discrimination regarding race, religion, age, sex, national origin, sexual orientation, gender identity or expression.