

JOB DESCRIPTION

POSITION TITLE: Donor Services Associate

DEPARTMENT: Foundation

REPORTS TO: Director of Operations

STATUS: Full-time, Non-Exempt

PRINCIPAL FUNCTION: As Jewish Atlanta continues to boom, the Atlanta Jewish Foundation intends to play a bold and creative role. The Foundation is part of Jewish Federation of Greater Atlanta. The Foundation manages over 1000 funds (donor-advised fund, agency funds, restricted funds, unrestricted funds) in the Atlanta community. The Foundation is looking for a creative, motivated, flexible, detail-oriented and proactive Donor Services Associate to join our efforts as we expand the ways we engage with donors in the community.

You will work with a passionate team of Foundation professionals to increase the impact of the organization's work here in Atlanta, in Israel and the world and help philanthropists give with more meaning and with ties to their Jewish values. You will collaborate with our key fundholders to provide excellent customer service. Manage and administer the Donor Advised Funds, the Restricted Funds, Agency Custodial Funds and Supporting Foundations of the Jewish Atlanta Foundation. Provide support to donors and professional advisors on questions/issues relating to their funds. Collaborate with other professional staff on programs to educate current and potential endowment donors.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

MAJOR RESPONSIBILITIES

Donor Relations and Customer Service

- Work with all donors to resolve issues, assist with fund agreements, grants, passwords etc.
- Review and approve all grants weekly and distribute checks accordingly
- Open all new charities requested by donors, research and retrieve the 990s
- Update charity, donor and agreement information in database
- Code AJF checks received, daily
- Enter grants in the system requested by email or phone
- Train new donors to use the online portal to monitor and track their funds
- Reach out to all donors with uncashed grant checks to reissue or put back in fund
- Update Stellar and Salesforce with changes to donor contact information, etc.

Reporting and Statement Preparation

- Prepare Agency monthly reports
- Compile information for the New Charity Committee to approve new charities requested by donors
- Prepare and distribute quarterly statements for Donor Advised Funds, Restricted Funds, Supporting Foundations and Agency Funds

- Quarterly update maintenance on all the funds, scan and update the CRM
- Update charity, donor and agreement information in database
- Generate AJF tax letters for charitable contributions

Other duties as assigned.

PHYSICAL REQUIREMENTS: Minimal physical effort required with intermittent standing and walking and prolonged periods of sitting in meetings or at desk working with computer. Position requires stamina to work extended days to include early morning, evening and weekend events and meetings in addition to the regular work schedule.

QUALIFICATIONS: Bachelor's degree or equivalent. Minimum 3 years of experience in Customer/Donor Service role. Proficiency in Microsoft Office and Salesforce, or other CRM experience required. Experience with donor databases. Ability to manage confidential information and use discretion and good judgment. Strong interpersonal skills with the ability to interact with all members of the organization and external community positively and successfully. Flexible, collaborative, and comfortable multi-tasking effectively in a fast-paced environment. Strong planning and prioritization skills and excellent attention to detail. Excellent written and verbal communications skills.

COMPENSATION: The salary range is \$50,000 - \$56,000 for this position plus a comprehensive benefits package. Anticipated salary near midpoint; commensurate with experience.

**Please submit cover letter and resume to employment@jewishatlanta.org.
Jewish Federation of Greater Atlanta/Atlanta Jewish Foundation is an equal
opportunity employer.**