

## **The Dayton Foundation**

### **~ JOB POSTING ANNOUNCEMENT ~**

#### **Development Assistant**

Hiring Hourly Rate: \$21.44/Hour

October Start Date

**Position Purpose:** To provide direct support services for the Chief Development Officer, Development Director, Director, Donor Services, and the VP of Development and Donor Services, and to assist with general assigned workload in the Development Department.

#### **Key Responsibility: Administrative Support for Development Staff**

- Enters and maintains donor and fund related information in Salesforce and Foundation Power, referencing TimeMatters for old data.
- Compiles reports from Foundation Power, Salesforce and TimeMatters as required by the Development Staff
- Creates and maintains database and reports monthly on Development Management Team goals, objectives and referrals.
- Provides word processing, copying, scanning and related clerical tasks for Development Staff.
- Prepares drafts of fund and legacy agreements, obtains necessary approvals and mails to donors. Makes corrections, reviews agreements for accuracy, enters information into database, prepares Donor Welcome Binders to send to individual donors once fund is complete, and sets up and disseminates files as required.
- Prepares Donor packets and keeps marketing material stocked.
- Makes travel, seminar and meeting arrangements for Development Staff as needed.
- Coordinates Development staff meetings; records and distributes minutes.
- Arranges Advisor Luncheons; sends out emails inviting advisors, orders lunch and sends reminder emails to those who plan on attending.
- Coordinates staff calendars and communications among Development Staff.
- Proactively review Development staff calendars to ensure they have necessary documents and marketing materials for their meetings
- Under direction of Development Staff communicates with donors through written correspondence and responds to donor and advisor requests for information packets.
- Maintains electronic and physical donor fund files and subject matter files on legal issues.
- Assists with the due diligence research and closing in connection with real estate gifts.
- Process all credit card and invoices for payment
- Verifies proper legal names and EINs of charitable organizations and their status, as needed.
- Completes special projects, as assigned.

#### **Key Responsibility: Fund Agreements and Deferred Gifts**

- Prepares drafts of fund agreements, obtains necessary approvals and mails to donors. Assists Development Staff with tracking status of agreement utilizing Salesforce and Pipeline report.
- Helps maintain fund agreement generating system in Salesforce/Conga.
- Makes corrections, reviews agreements for accuracy, prepares agreements for signature and generates conga sign electronic signature, mails to donor for signature or schedules

appointment for donor to come in and sign. Assists Development Staff with tracking status of agreement utilizing Salesforce and Pipeline report.

- Scans signed agreements, scan document, save to systems and notify other departments of new fund as well as and maintaining donor and fund related information using Foundation Power and Salesforce. Checks Dayton Daily News obituaries on a daily basis for deceased donors, and updates Foundation Power and Salesforce. If donor is deceased, sends email to receptionist to circulate obituary to applicable TDF employees.
- Enters and maintains donor and fund-related information using Foundation Power and Salesforce. Compiles reports from information as required by the Development Staff.
- Helps to maintain Salesforce Database and answer questions for TDF as it relates to Salesforce.
- Maintains docket of probate and trust cases where The Dayton Foundation is listed as beneficiary; collects necessary information; reviews depository documents, inventories and accounts; alerts Development department/assigned staff to any irregularities, delays of any kind, or concerns.
- Develops, implements, and maintains procedural systems and form documents for the efficient processing of probate and trust cases and other donor related matters.

**Key Responsibility: Administrative Support for Development Committee**

- Compiles reports to Governing Board and reviews Development status/progress.
- Prepares materials, arranges for meeting and lunch, confirms attendance of committee members, sends out reminders of meetings, and participates in Development Committee meetings.
- Records and distributes meeting minutes.

**Key Responsibility: Computer Database**

- Enters information on new funds, new donors and other applicable information in Foundation Power and Salesforce.
- Processes, updates and monitors CRM donor, advisor and fund data to ensure timeliness and accuracy of information. Seeks answers and resolves all discrepancies.
- Ensure up to date in Salesforce regarding data, processes and workflows.
- Helps Development and other departments generate reports through Salesforce for pipeline reporting, new funds reporting and other reports as requested.
- Understands department processes to develop advanced knowledge of and skill using Salesforce, Foundation Power, Excel and Word (particularly mail merges) to increase departmental work efficiency and effectiveness.

**Key Responsibility: Back-Up Receptionist**

- In absence of receptionist, answers telephone and directs calls and messages to appropriate staff.
- In absence of receptionist, greets visitors in courteous and professional manner and directs to appropriate staff.
- In the absence of receptionist and primary backup, serves as secondary back up for opening mail, processing checks, according to cash receipts process, and distributing mail.

**Key Responsibility: Back-Up Administrative Assistant to the President**

- In the absence of the President's administrative support, provides all aspects of clerical assistance to the President, including correspondence, calendar coordination, etc.
- Completes special projects, as assigned.

**Position Qualification Requirements:**

*Education and Work Experience*

High school diploma or equivalent with some junior college or technical school preferred and minimum of three (3) to five (5) years of job-related experience, preferably in the relationship management, sales, investment or probate and/or estate planning areas. Salesforce experience is preferred. OR Any equivalent combination of education and experience that provides the required knowledge, skills and abilities.

**Knowledge and Skills:**

- Knowledge of office administration procedures and probate court practices, preferable
- Ability to operate most standard office equipment
- Proficiency in or knowledge of using a variety of computer software applications, i.e., word-processing, spreadsheets, graphics, database, etc., as job requires
- High level of interpersonal skills to handle sensitive and confidential situations
- Attention to detail in composing, typing and proofing materials, establishing priorities and meeting deadlines
- Good to excellent telephone, spelling, grammar, written and oral communication skills
- Experienced with Word, Hot Docs, TimeMatters and Salesforce

**Send résumé and cover letter via fax or email to:**

**LaTonia McCane, Director, Human Resources**

**The Dayton Foundation**

[lmccane@daytonfoundation.org](mailto:lmccane@daytonfoundation.org)

**FAX: 937-222-0636**

**Closing Date: October 15, 2021**

*The Dayton Foundation is an Equal Opportunity Employer*