~ JOB POSTING ANNOUNCEMENT ~
THE DAYTON FOUNDATION
Donor Services Associate
Development and Donor Services Department
Starting Hourly Rate: $22.31
24 hours per/week Feb-Oct - 40 hours per/week Nov-Jan

Position Purpose: To provide friendly, quality service to donor/advisors for a portfolio of assigned funds by processing grants and expenses, providing reports, answering questions, maintaining database information and monitoring the administration of the funds in your care.

Assigned Funds: Portfolio of Individual CCAs and invested DAF’s

Monitor the administration of the funds in your portfolio
- Be familiar with all fund agreements in your portfolio.
- Maintain regular contact with fund advisors.
- Track, implement and record all standards and practices according to the fund agreement and fund advisor’s wishes.
- Conduct a fund review at least annually.
- Review fund agreements for new funds under your purview as needed.
- Initiate and monitor closing of funds as needed.
- Ensure that fund advisors understand and follow policies and procedures of The Dayton Foundation, including fundraising, website, health and safety policies.

Process grants and/or program expenses for the funds in your portfolio
- Monitor fund balance and spending limits to ensure adequate funding for grants.
- Receive, review and enter all grants for your funds.
- Compile weekly edit report for final review by supervisor.
- Ensure all grant checks are mailed and all grant EFTs are processed.
- Send all grant confirmations to fund advisors.
- Send grant communications to grantee organizations as needed.
- Follow up on open checks monthly.
- Process grant voids and refunds as needed.
- Track and follow up on reporting requirements for grants from your funds.
- Assure compliance with all Dayton Foundation and IRS regulations regarding grants from donor advised funds.

Serve as the primary contact for donor/advisors for your funds and provide needed support and information
- Respond to donor calls and emails.
- Provide quarterly statements and other reports to fund advisors as needed.
- Provide support and training to donors using Donor Express.
- Communicate with donor/advisors as needed regarding fund balances, spending limits, and carryover amounts.
- Assist donor/advisors with Dayton Foundation policies and procedures for fundraising events, websites, safety, and others as needed.

Maintain accurate fund and organization records for the Dayton Foundation database
- Monitor and update fund information in both Foundation Power and Salesforce as you interact with donor/advisors. This includes contact information, interested party updates, and website security information.
• Participate in efforts to communicate with donors to request updates.
• Participate in database cleanup efforts assigned by supervisor.
• Be responsible for correctly filing, saving, and storing all physical and digital records for your funds.

Support Dayton Foundation staff by assisting team members and performing backup tasks as needed
• Provide regular backup for the receptionist.
• Learn assigned functions of the grants team and provide backup when needed.
• Provide reports regarding your funds to Dayton Foundation committees and staff as needed.
• Participate in reconciliation of spending account with finance department as needed.
• Deposits gifts of cash or checks into local bank accounts.

Back-Up Receptionist
• In the absence of the receptionist, answers telephone and directs calls and messages to appropriate staff.
• In absence of the receptionist, greets visitors in courteous and professional manner and directs to appropriate staff.
• Processes outgoing mail, ensuring proper postage has been affixed.
• Processes incoming mail; opens, stamps, routes and investigates mis-addressed mail for proper routing.
• Performs other specific duties as directed to facilitate processes and support TDF goals.

Position Qualification Requirements:
Education and Work Experience
Minimum of a high school diploma or equivalent, with college or technical school degree preferred and minimum of two (2) to four (4) years of job-related experience OR Any equivalent combination of education and experience that provides the required knowledge, skills and abilities.

Knowledge and Skills
• Excellent telephone and customer service skills
• Attention to detail
• Excellent database skills
• Ability to operate most office equipment
• Proficiency in Word and Excel
• Ability to maintain confidentiality

Send résumé and cover letter via email to:

Jeanne Holihan, Sr. VP, Operations
The Dayton Foundation
jholihan@daytonfoundation.org

Closing Date: Friday, August 24, 2022

The Dayton Foundation is an Equal Opportunity Employer.