



Position: DONOR SERVICES ASSOCIATE

Description of Position:

The Donor Services Associate is a full-time, exempt staff position whose primary responsibility is to support donors and fund holders. S/he works as an integral part of the finance team to process gifts; to enter advised, designated and inter-account grants; and to assist the Vice President – Philanthropic Services in maintaining Foundation fund holder relationships. With a primary focus on processing gifts, the Donor Services Associate is key player in event gift management.

Reports To: Director of Finance & Operations

Primary Duties and Responsibilities:

- Gifts:
 - Prepare and process deposits, delivering to bank when needed.
 - Process contributions, including event and non-cash gifts, received by the Foundation and prepare appropriate acknowledgement letters in a timely manner.
 - Enter and update donor profiles for gift entry.
 - Maintain donor files, including retention of paper and electronic copies of hand written correspondence.
- Advised & Designated Grants:
 - Process designated and advised grants, completing grantee due diligence as needed.
 - Process inter-account grants, including those associated with event stock gifts.
 - Process annual endowment distributions.
 - File grant recommendations along with associated payment records and supporting documents.
 - Assist with researching uncashed advised grant payments as needed.
 - Reconcile pass through funds at least quarterly.
- Funds:
 - Set up new advised funds and associated profiles in iPhi.
 - Create and maintain advised fund records, including retention of paper and electronic fund agreement copies and related documents.
 - Prepare, collate, and disseminate quarterly fund statements and accompanying collateral.
 - Help administer giving circles, such as Thursday Roundtable and Wednesday Lunch Group.
- Other:
 - Support the Vice President – Philanthropic Services with fund holder relationship management.
 - Assist with creating donor lists and mailing lists as needed.
 - Continually look for opportunities to streamline the efficiency of gift/grant processing, acknowledgement, and associated record keeping.
 - Serve as back-up for the Officer Administrator.
 - Support all other staff members in achieving the Foundation's mission.
 - Serve as a professional representative of the organization.

Skills/Experience Required:

- Solid understanding of basic accounting principles, with 2+ years accounting, finance, and/or data entry work experience.
- Excellent computer skills and aptitude, including proficiency in word processing, spreadsheets, and database systems.
- Ability to learn specialized nonprofit management software.
- Strong organizational skills, attention to detail, ability to prioritize and work independently.
- Excellent interpersonal and communication skills, both written and oral.
- Ability to exercise good judgment and solve problems independently.
- Ability to work cooperatively with colleagues, supervisors, volunteers, grantees, and donors.
- Flexibility: able to adjust activities and priorities and take on new responsibilities.
- Intense commitment to the mission and work of the Community Foundation of Jackson Hole.
- Impeccable moral and ethical standards and conduct.