



MILWAUKEE
JEWISH FEDERATION

JOB DESCRIPTION

DEVELOPMENT ASSOCIATE

Department: FDR

Reports to: VP of Philanthropy

FLSA Status: Non-exempt

Work Status: Full time

About the Organization

Through the development of community-wide financial support, planning and allocations, the mission of the Milwaukee Jewish Federation is to ensure the continuity of the Jewish people, to enhance the quality of Jewish life and to build a strong unified Jewish community in Milwaukee, in Israel and throughout the world. In fulfilling its mission, the Federation is committed to the principles of Klal Yisrael (the collective unity of the Jewish people), tzedakah (the obligation to care for one another) and tikkun olam (improving the society in which we live). [Learn more about the Milwaukee Jewish Federation.](#)

Summary/Objective

1. The Development Associate will provide high-level and project-based administrative organizational support the Senior Donor Officer and NexGen Leadership Director.

Essential Functions

Departmental Responsibilities:

- Managing the portfolio and soliciting gifts under \$1000
- Assisting with special projects and program assistance for the NexGen Leadership Director/ program and the Senior Donor Officer/ program
- Database management: Enter and edit contact information in CRM, including any interactions provided by Campaign-address updates from the mail-house, updating contact preferences and household/constituent statuses.
- Prepare and send emails and written correspondence on the department's behalf, including but not limited to: pledge and tribute acknowledgments, volunteer packets, FRD and JCF mailings, etc.
- Interaction with donors: including answering account questions, accepting pledges and payments, and general correspondence.
- Prepare condolence letters for families of recently deceased donors.
- Prepare requested materials for volunteers, meetings and events, such as agendas, power point, donor lists, etc.
- Coordinate meeting set up, including food orders.
- Coordinate and execute quarterly statement runs, set up and monitor credit card payment plans, resolve payment issues with Business Services.
- Coordinate mailing of both payment and pledge acknowledgment letters.
- Assist the Campaign Director and other development staff with meetings, including scheduling, calendaring, expense reports, meeting minutes and assistance with Building Maintenance ongoing improvements.

- Assist with campaign mailings, including appeals, holidays, birthdays, acknowledgments and Major Donor communications.
- Coordinate and mail birthday cards to long-term and major donors.
- Maintain department files – both paper and electronic for FRD.
- Attend and participate in all appropriate department meetings and events.

Additional Functions:

- Assist in maintaining designated areas of the building (coffee station)
- Run donor and solicitor reports, pull lists and run basic queries
- Assist the event coordinator with event preparation, including event set up and clean up when necessary.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Required Education/Credentials/Experience

- Bachelor's degree preferred, but a combination of education, training and experience may be adequate.
- 1 - 3 years program and/ or administrative experience preferred

Required Skills/Abilities

- Strong verbal, written and interpersonal skills; ability to communicate professionally to a diverse audience
- Extremely accurate with above average attention to detail
- Highly organized self-starter with ability to prioritize workload while meeting both short and long-term deadlines
- To perform this job successfully, an individual should be proficient with technology, Microsoft Office Suite, especially Excel and Power Point, formal document preparation and database management, familiarity with development software a plus.
- Must also have familiarity with e-mail and Internet applications as well as a willingness and ability to learn new programs.

Supervisory Responsibility

This position has no supervisory responsibility.

Work Environment

- This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.
- On occasion must be available to work non-traditional office hours to assist/attend meetings and events.
- On occasion will be called upon to answer a multi-line telephone at the reception desk and assist visitors.

Physical Demands

This is largely a sedentary role; however, some filing is required. This would require the ability to lift files, open filing cabinets and bend or stand as necessary. On occasion may

also help transport and carry meeting and event supplies. On occasion it may be necessary to lift and/or move up to 15-20 pounds, usually waist high.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required to perform the job. Duties, responsibilities and activities may change at any time with or without notice.

Signatures

This job description has been approved by management on _____:

Manager _____

COO/HR _____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____