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Development Assistant

Department:	Development
Supervised By:	Director of Development
Supervises:	Fundraising volunteers
Status:	Hourly, Non-exempt
Hours:	Full-time; some weekend and evening work required as needed
Location:	On-site at main location in Hinsdale

Summary of Position:

The Development Assistant is responsible for executing a wide range of functions in the Development department and working closely supporting the Development team and Chief Executive Officer. The Assistant builds and maintains the foundation from which the Development department executes its critical fundraising activities, and thus has a high level of responsibility throughout the organization.

The ideal candidate must have fundraising database experience (Donor Perfect preferred), extreme attention to detail, a passion for the mission of Wellness House and, most importantly, a willingness to learn. The Development Assistant will be a part of a collaborative team and will have great exposure to all aspects of fundraising.

RESPONSIBILITIES:

Gift Entry, Donor Correspondence and Administration (approximately 50% of time)

- Enter financial donations and special event purchases into databases.
- Ensure proper integration of event databases into organizational fundraising database.
- Process credit card contributions.
- Prepare donation files and upload to QuickBooks. Deposit checks at bank or using remote bank deposit scanner.
- Create timely and personalized thank you letters and donor receipts.
- Manage matching gift and challenge grants, ensuring paperwork is processed and requirements are fulfilled.
- Manage tribute gift process and letter notifications.
- Manage tribute brick order process from donor request through installation.
- Generate and scrub customized mailing lists for fundraising and communications mailings. Coordinate with department and vendors to format appropriately. Document mailings as contacts in Donor Perfect.

- Provide administrative support for revenue reporting; assist in the management of paper and digital files.
- Maintain and update department process manual and procedures for this position's duties.
- Assist with the coordination of board member participation in signing donor correspondence, invitations, and donor acknowledgements.
- Support senior leadership and board committees by tracking board member giving and participation by documenting board member fundraising.
- Schedule and train Development department volunteers and seasonal temp.

Database Management (approximately 32% of time)

- Ensure integrity of contact management database and mailing lists for communications, marketing, and fundraising.
- Ensure that external contacts are included in database and that their relationships, giving histories and activities are recorded in a timely and accurate manner. Add and update records, merge and remove duplicate records.
- Develop custom reports and provide analysis to team to evaluate donor base and progress to fundraising goals across revenue streams (e.g. foundation/corporate gifts, annual fund, major gifts, board giving).
- Work with the Director of Finance to reconcile Donor Perfect and QuickBooks. Prepare monthly reconciliation report to compare and balance Donor Perfect to QuickBooks records.
- Support Director of Finance with annual audit and 990 documentation.
- Uphold best practices in database management and educate team and broader staff on said practices, as needed.
- Monitor and organize department supplies for donor mailings and events.

Event Support (approximately 15%)

- Prepare and execute mail merges for event sponsorships.
- Generate and scrub mailing lists for event attendees, both pre- and post-event.
- Prepare donation files and regular imports from external databases (e.g. Qgiv) into Donor Perfect.
- Prepare all acknowledgment letters for gifts pledged, gifts received, tickets purchased, etc.
- Provide administrative support for each event, provide day-of management at each event.

Major Gifts, Foundation, Corporate and Grant Support (3%)

- Support Directors with individual donor research. Produce giving history, donor profiles and donor briefings as needed. Help prepare reports for funded grants. Provide basic Wellness House attachments and prepare hard copy mailings as required.
- Assist with grant proposals: provide support information for grant proposals.

- Arrange food & beverage, technical needs, and logistical items for any Board, donor or funder meeting and/or presentation.
- Maintain files and records of donor or prospect correspondence and intelligence (digital and paper).
- Arrange and send mementos to donors and or prospects.
- Prepare packets and briefings for meetings with funders and donors.
- Generate specified donor or funder correspondence.

Other

- Maintain highest confidentiality with donor and gift information.
- Update job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations.
- Perform general office tasks and other duties as assigned

Attendance at Meetings Required

- All Staff meetings (monthly)
- Departmental team meetings
- Grants meetings (take notes, as requested)

Attendance at Events Required

- Walk for Wellness House (First Sunday in May)
- Fall Ball (October)
- Lifetime Trustee Dinner (June)

Performance Measures:

To be filled in each year during annual evaluation, by employee and supervisor

QUALIFICATIONS

Education: Bachelor's degree

Experience: 1-2 years of database experience and/or experience in a fundraising role

Special Knowledge & Skills:

- Basic fund development principles and best practices
- Must be PC proficient. Must have very strong experience with databases, Excel, Word and Outlook
- Strong writing skills

- Familiarity with fundraising software (Donor Perfect preferred)
- Familiarity with project management software (Monday.com preferred)
- Strong interpersonal and customer service skills required.

Demonstrated Competencies:

- Must be well organized, able to multi-task, work under pressure and meet deadlines, able to problem-solve and prioritize.
- Able to work independently and as part of a team and take on new tasks with high level of difficulty. Able to work with a diverse group of people.
- Commitment to the mission of Wellness House

Work Environment:

Position requires frequent and regular computer and phone use and employee is regularly required to use hands, talk and hear. Position requires occasional ability to lift 25 pounds. The employee is frequently required to stand; walk; sit; reach with hands and arms, balance, stoop, kneel or crouch. Access to a car is helpful.

Wellness House is an EOE.