



Job Title: Development Associate
Department: Development
Reports To: Assistant Director of Development, Annual Giving
Supervision Exercised: None
FLSA Status: Full time, exempt

SUMMARY: This position is an essential part of the Development team and supports each level of the department for a well-rounded perspective of the different roles and skills that make up a fundraising team. The Development Associate is responsible for essential fundraising operations including gift processing, receipting, tracking and gift acknowledgment functions.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Core responsibilities include gift processing, acknowledgement processes, data integrity, and database reports, as well as VP and development team support. The position duties include:

Gift Processing

- Prepare gifts for coding and processing
- Coordinate and manage checks and electronic deposits with Finance and ticket office donations with the Ticket Office Manager
- Follow PCI compliance for credit card gifts
- Segment and prepare daily gift batches for distribution and sign-off
- Coordinate and execute gift batch entry and posting into the database
- Organize and maintain all gift collateral digitally for audit and IRS compliance
- Process and track matching gifts, stock transfer info, IRA distributions, soft credit gifts via donor advised funds, trusts, etc.
- Apply correct Fair Market Value to gift records in Tessitura database, following IRS regulations
- Track and update donor membership levels in Tessitura database

Acknowledgement Letters

- Data extraction and organization
- Customizing letters as needed
- Prepare acknowledgements in a timely and organized manner for letter mail
- Coordinate with Website and Digital Content Manager as needed for acknowledgements sent by email

Database

- Pull standard reports and queries from the Tessitura database
- Routine and case-by-case data extraction or data requests
- Obituary and prospect research using iWave and other research tools
- Maintain data integrity with accurate input of data

- Maintain digital records of gifts, transmittals and receipts in database and on Symphony drive
- Contact donors on an as needed basis to maintain up to date contact and gift information

VP and Development Team Support

- Manage routing documents/lists to the Development team for review
- VP support as assigned
- Coordinate Development departmental items
- Support for events
- Support for donor cultivation and stewardship
- Redirect or respond to voicemails and emails received on the Development general voicemail and email inbox as appropriate
- Manage essential office supplies like letterhead, envelopes, and stationery for gift acknowledgement and other donor communications
- Oversee and update internal Development manuals related to gift processing and other job functions
- Other duties as assigned

QUALIFICATIONS: The requirements listed below are representative of the knowledge, skill, and/or ability required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience:** Associate's degree (AA) or equivalent from two-year college or technical school; basic understanding of fundraising and 1 or more years of related experience preferred.
- **Language Skills:** Ability to write clearly with proper spelling and grammar to produce gift acknowledgments. Ability to speak effectively to donors, Board members, employees, vendors and others.
- **Mathematical Skills:** Ability to perform basic mathematical calculations including addition, subtraction, multiplication, division, percentages, and averages.
- **Reasoning Ability:** Ability to organize systems, coordinate deadlines, handle logistics, interpret instructions provided in writing, orally or in diagram form.
- **Computer Skills:** Ability to use Microsoft Word, Excel, and Outlook; ability to use Adobe Pro; ability to use or learn quickly the donor/ticketing database software (Tessitura). Ability to research on the internet.
- Exceptional attention to detail and efficient proofing skills to note and track gifts of all types and sizes and note any errors.
- Ability to work effectively and diplomatically with diverse personalities, including donors and potential donors, Board of Directors, volunteers, Symphony musicians, other staff, conductors, and guest performers.
- Excellent customer service skills via phone, email, etc.
- Comfortable to greet all types of guests and have keen awareness to safety concerns.
- Ability to work effectively and gracefully under pressure.

COMPETENCIES: To perform the job successfully, an individual should demonstrate the following competencies.

- **Ethics** - Treats everyone with respect; Keeps commitments; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values; Maintains confidentiality.
- **Customer Service** - Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service.
- **Teamwork** - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.
- **Leadership** - Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others.
- **Analytical** - Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs work flows and procedures.
- **Problem-Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem-solving situations; Uses reason even when dealing with emotional topics.
- **Communication** - Speaks and writes informatively, clearly and persuasively; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.
- **Change Management and Adaptability** - Develops workable implementation plans; Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results; Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.
- **Technical Skills** - Assesses own strengths and weaknesses; Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others.
- **Business Acumen and Fiscal Management** - Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals; Works within approved budget; Contributes to profits and revenue; Develops and implements cost saving measures; Conserves organizational resources.
- **Organizational Support** - Follows policies and procedures; Completes administrative tasks correctly and on time; supports organization's goals and values; observes safety and security procedures; Respects diversity.
- **Strategic Thinking and Innovation** - Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions; Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving work; Develops innovative approaches and ideas; Presents ideas and information in a manner that gets others' attention.
- **Judgment** - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.
- **Planning/Organizing** - Prioritizes and plans work activities; Uses time efficiently; Plans for additional resources; Sets goals and objectives; Organizes or schedules other people and their tasks; Develops realistic action plans.
- **Professionalism** - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

- **Quality and Quantity** - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality; Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Works quickly.
- **Dependability** - Is consistently at work and on time; Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan; Plans in advance for time off.
- **Motivation and Initiative** – Requires minimal supervision; Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals; Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to handle or feel; reach with hands and arms, and talk or hear. The employee is regularly required to stand and walk. The employee must occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job include ability to use computer monitor and to read standard print documents.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This position is currently operating in a hybrid on-site / remote capacity, though may require full-time in office work in the future, Attendance at events is required. The employee is required to provide internet access when working remotely.

While performing the duties of this position, the employee is occasionally exposed to moving mechanical parts such as computer printers. The noise level in the work environment is usually moderate.

For a full position description, please visit www.orsymphony.org/about/careers/

If you are interested in the position, please submit a cover letter and resume to careers@orsymphony.org. No phone inquiries, please.
Position is open until filled.