PAYROLL TITLE:
WORKING TITLE: Development Coordinator
FLSA: Non-exempt
SALARY GRADE: $23.97 - $28.37
STATUS: Full time
DEPARTMENT: External Relations (DEV)
REPORTS TO: Director, Major Giving
SUPERVISORY? No

Date Prepared: June 28, 2013
Date Revised: October 19, 2021

Titles of Employees Supervised (if applicable): N/A

POSITION SUMMARY

Reporting to the Director, Major Giving, provides a full range of administrative support to the Director, Major Giving (DMG) and the Director, External Relations (DER). Incumbent is responsible for Salesforce database contact reports, proposals, queries, solicitation and invitation lists, and action reports. Provides monthly reconciliation and detailed reporting on Directors' respective budgets (Annual Giving, Excellerators & NY program and Special Giving); prepares and reconciles all reimbursement and payment requests; drafts donor solicitation, stewardship and general communication letters and event invites and communications; ensures completion of all required mailings; provides internal and external scheduling and travel arrangement support; coordinates meeting and event logistics. Interacts with all levels of the organization, including senior management and faculty, major donors and members of the community. Responsible for independent problem-solving and performing duties with a high level of service and the utmost courtesy and confidentiality. Assists with evening and weekend donor events.

ESSENTIAL FUNCTIONS

1) Administrative and Project Support (65%)

A. General Office Support:

Provides general office support, including screening telephone calls using tact, diplomacy, judgment and political sensitivity, making and scanning copies, acting as the unit liaison for any internal requests/needs, ordering supplies and equipment, taking meeting minutes and running errands.

Independently composes general correspondence. Ensures accuracy of all documents using attention to detail.

Coordinates internal and external appointments calendar for the DMG and DER.

Coordinates all internal and external meetings/lunches. Ensures the completion of all scheduling, catering needs, meeting room reservations and distribution of meeting handouts and presentation materials.

Maintains comprehensive system of records for assigned area, including but not limited to donor information, event statistics and follow up, internal and external communications, audit-ready budget reconciliation, travel preparation and scheduling.

Coordinates travel for respective Directors, including securing air/travel transportation and lodging, processing all required paperwork/vouchers/documentation before and after trips and preparing detailed itineraries.

Prepares all payment requests including reimbursements, advance payments and Purchase Orders for all assigned activities, including events.

With Directors, and Director, Donor Relations and Stewardship, develops a system and schedule by which assigned donors are stewarded appropriately, including letters, invitations, mailings, etc.

Drafts donor letters and communications, including solicitation, stewardship, updates, event invites and other general communications. Includes checking for accuracy of mailing lists, executing complicated mail merges, printing and collating, and processing postage and payments.

B. Event Management Support:

Provides full range of event support to Directors. Events include but are not limited to all NY events, Excellerators program events and meetings, disease-focused luncheons, PC holiday lunch, alumni mixers, salon events and all other internal and external special events and meetings as assigned.

Working with the DER, coordinates Symphony at Salk sponsor ticket sales and table seating. Acts as liaison to sponsor contacts and enters and updates pertinent information into Salesforce database and related event management software as needed. Creates daily revenue and guest count reports. Coordinates and submits sponsorship grant application data and tracks status. Tracks and answers calls and emails to Symphony phone line and email account.

Manages Symphony, President’s Club, Chairman's Circle, Excellerators, NY luncheon mailings. Includes checking for accuracy of lists, executing complicated mail merges, printing and collating and processing postage and payments.

Handles all event logistics including drafting of correspondence and invites, establishment of appropriate mailing lists, ensuring timely mailing of collaterals, working with Salk events staff for catering and rental needs, attending all planning meetings, and acting as liaison for event contacts, including vendors and invitees.

Coordinates all event-related travel, including securing air/travel transportation and lodging, processing all required paperwork/vouchers/documentation before and after trips/events, and prepares itineraries, purchase orders and expense reimbursement documents.

2) Salesforce Database Support (25%)

Attends regular portfolio meetings for Directors, taking notes and assisting with data updates as needed.

Researches, analyzes and prepares reports on giving, including statistical information and giving histories.

Prepares reports detailing donor behavior for various segmentations.

Reviews, extracts, and maintains data on prospects and donors in the database.

Coordinates background research on prospective donors, working closely with Development Services.

Responsible for timely and accurate Salesforce entries, including contact reports, actions, tasks and proposals. Follows up with Directors to ensure up-to-date, accurate information in preparation for Frontline Fundraisers meetings.

Working with Development Services, develops, reviews, analyzes and summarizes reports and updates on current and prospective donors in a timely manner, determining the most appropriate format.

Handles all relevant event Salesforce database entries, including seating charts, attendee lists and follow-up details.

3) Fiscal Support (10%)

Completes weekly and monthly budget review and audit-ready reconciliation for assigned budgets. Reviews posted expenses and estimates spending for remainder of the fiscal year. Ensures accuracy of all reports before seeking approval. Maintains comprehensive filing system of all financial records.

Coordinates all pending payment requests with current budget activity.

Completes final monthly budget summary report for each fund number, including projected expenses for remainder of fiscal year.

Working with Development Services, administers all gift-related fiscal/budgetary issues and activities including the running of year end reports, review and corrections of gift coding, research of gift data, tracking and reporting of all costs to direct mail, tracking and reporting of fund balances.

Processes financial and travel forms and documents.

Prepares program support budget status reports and projections for review by Directors.

EXPERIENCE

Required:

- 2+ years of increasingly responsible management-level administrative support experience.
- Experience with budget reconciliation and preparing financial and expense reports.
- Experience with event and meeting logistical preparation.
- Demonstrated experience in producing executive level events, and knowledge of principles and practices of events management.
- Proven experience in writing/editing general correspondence and miscellaneous documents as well as experience with drafting and editing briefings, donor profiles and stewardship documents in a fundraising context.
- Demonstrated experience with executive level calendaring.
- Demonstrated ability to operate office equipment proficiently, including copiers, scanners and FAX machines.

Preferred:

- Demonstrated skill in utilizing major online databases in fundraising, non-profit institute environment and/or other reference sources.
- Knowledge of the principles and processes of professional fundraising.

EDUCATION

Required

- High school diploma and at least 2 years' administrative experience.

Preferred

- Bachelor's degree in business or related field or an equivalent combination of work experience and education.

SKILLS AND ABILITIES

Required

- Strong, demonstrated ability to provide critical analysis, with proven ability to research and present summaries in a succinct manner using realistic expectations.
- Strong demonstrated organizational skills with ability to prioritize daily operations and projects in order to meet rigid deadlines to ensure smooth workflow and handle multiple tasks simultaneously, often working under pressure with frequent interruptions.
- Exceptional interpersonal skills to communicate and interact in a courteous, politically correct and effective manner, using tact and diplomacy while exercising good judgment with individuals at all levels in person, in writing or by telephone.
- Ability to make excellent decisions and to employ mature judgment under demanding conditions and/or when confronted with frequently changing priorities.
- Demonstrated skill in using personal computers and a wide variety of software packages for presentations, written communication, data processing and electronic communication (MS Word, Excel, www, Outlook, Power Point, and Visio).
- Demonstrated ability to problem-solve or make recommendations or independent decisions for creative solutions to general issues/problems.
- Proven ability to work with high level on independence, maintain confidentiality, prioritize assignments and departmental need to meet deadlines and use discretionary practices in all interactions.
- Ability to work with a diverse group at all levels of the organization, including senior management, faculty, staff and external components.
- Excellent communications skills, including verbal and written. Ability to write acknowledgement letters and other communications, as needed, on behalf of senior management.
- Ability to research, gather and organize information to produce concise reports using relational databases. Experience using the internet and web browsers; ability to research topics and summarize findings.
- Ability to ensure confidentiality of information and sensitive documents by following operational procedures and exercising judgment in responding to requests.

SPECIAL CONDITIONS OF EMPLOYMENT

- Must be willing to work in an animal-related research environment.
- Occasional evening and weekend overtime to assist with donor events.
- Satisfactory completion of the Institute’s background investigation.
- Must sign an employee confidentiality agreement.

PHYSICAL REQUIREMENTS/MENTAL ACTIVITIES/ENVIRONMENTAL CONDITIONS

Choose the frequency of activity or condition required of the employee to perform the job. (Hours per day) Rarely (0-1) Occasionally (2-3) Frequently (3 -6) Constantly (6 -8)

Physical Requirements

	Rarely (0-1)	Occasionally (2-3)	Frequently (3-6)	Constantly (6-8)
Adjusting Focus				X
Balancing	X			
Bending		X		
Carrying 0-20 lbs		X		
Carrying 20-50 lbs	X			
Carrying 50+ lbs	X			
Climbing	X			
Crawling	X			
Grasping				X
Handling		X		
Hearing				X
Keying				X
Kneeling	X			
Lifting 0-20 lbs		X		
Lifting 20-50 lbs	X			
Lifting 50+ lbs	X			
Pushing/Pulling 0-20 lbs		X		
Pushing/Pulling 20-50 lbs	X			
Pushing/Pulling 50+ lbs	X			
Reaching		X		
Seeing				X
Sitting				X
Standing		X		
Talking				X
Touching/Feeling		X		
Walking		X		

Mental Activities

	Rarely (0-1)	Occasionally (2-3)	Frequently (3-6)	Constantly (6-8)
Analyzing				X
Calculating				X
Communicating				X
Reading				X
Reasoning				X
Writing				X

Environmental Conditions

	Rarely (0-1)	Occasionally (2-3)	Frequently (3-6)	Constantly (6-8)
Confined Areas		X		
Exposed to Weather	X			
Exposure to Animals	X			
Extreme Temperatures	X			
Fumes/Odors/Mists/Dusts	X			
Noise Exposure		X		
Potential Allergens	X			
Potential Hazards	X			
Vibrations	X			
Work Inside				X
Work Outside		X		

Approvals (*Please sign and date digitally or by hand for formatting integrity*)

_____	_____	_____
Supervisor Name	Signature	Date
_____	_____	_____
Human Resources Name	Signature	Date

NOTE: This document is not intended to be all inclusive. Employee may be required to perform other related duties to meet the ongoing needs of the Institute. This job description will be reviewed periodically as duties and responsibilities change if necessary. Essential job functions are subject to modification at the sole discretion of the Institute.

Employee Acknowledgment

_____	_____	_____
Employee Name	Signature	Date