



Development Assistant

Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.

In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. You will also actively play a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.

SUMMARY

The Development Assistant provides a wide variety of skilled administrative support for the development program as well as senior staff and Committees of the Board of Directors. This position will interact with donors and have access to confidential donor information which requires considerable use of tact, diplomacy, discretion and judgement. This position also assumes responsibilities for special projects, development documentation management, and develops reports and data for management decision making.

The Development Assistant directly supports the Chief External Relations Officer (CERO), the CEO (with regard to development), the Chair and members of the Development Committee, and the Development team. This position also provides support for projects and events and prepares monthly departmental reports and other materials.

This is a full time (flexibly scheduled), non-exempt, hourly and benefit eligible position. Depending on candidate experience, the hourly rate range is \$23.00 - \$25.00. This position is eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k) (after 6 months of employment), vacation, sick leave and holiday pay. The schedule will require some weekends and evenings so flexibility to meet the needs of the organization is important.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:

Development

- Serve as the Development Assistant providing direct support in producing reports, invitation lists, mail merge projects, filing and document management, scheduling, and other basic administrative needs;
- Oversee the donor database management (Altru) including creating appeals, tracking donor interactions and moves management, clean-up and entry projects; serve as a database expert;
- Provide direct data entry and produce acknowledgement letters in an accurate and timely fashion;
- Assist with writing compelling appeals to donors, members, and other external audiences;
- Research and compile reports and presentations on development programs that require the use of databases, advanced MS Word, Excel graphs and tables, and Powerpoint presentation;
- Engage in direct donor stewardship based on department guidelines, particularly that mid-level and major donors received notes, phone calls and invitations from CEO and Development Manager;
- Assist with fundraising and cultivation event management, including event planning, invitation and guest list management, registration, catering and other vendors, and event coverage;
- Manage special gifts and related supplies including premiums and auction items;
- Serve as the contact, scheduler and presenting member for the Speaker's Bureau;
- Participate in Development Committee meetings and develop actionable minutes with particular regard to accuracy and confidentiality;
- Work regularly with confidential information and ensure its security;

Administrative Support

- Provide administrative and clerical support;
- Serve as primary back-up trained in all areas of support for membership function and trained in Altru to be able to provide assistance as needed in any area;
- Oversee mailings including list management, mail merges and mailing production;
- Prepare correspondence, bulletins and communications, with particular attention to high level formal communication standards;
- Oversee meeting planning and small event set-up including room, food, AV and other needs;
- Manage development department filing system, including individual donor files, both hard copy and electronic;
- Plan, manage, and/or participate on special projects or activities as needed;
- Manage the development office area to maintain it in a neat and orderly manner serve as function space for staff but presentable space for an external audience;
- Provide general office management support including ordering and maintaining supplies, managing copies and mail systems and coordinating materials needed for projects;

General

- Provide welcoming and helpful service to staff, volunteers, members, Board Members, donors and the public – whether in-person or on the phone;
- Support Filoli's diversity, equity, accessibility and inclusivity efforts and ensure the equitable treatment of all donors;
- Work a flexible schedule based on the needs of the organization and be available to dependably see projects through to completion;
- Uphold all Filoli's policies, procedures, guidelines and standards;
- Maintain flexibility and perform other duties as assigned to respond to the needs of the organization, including running errands in support of events, meetings and projects;
- Attendance and punctuality are essential to work and all work-related functions.

SUPERVISORY RESPONSIBILITIES

This position will occasionally supervise volunteers.

MINIMUM QUALIFICATIONS

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

Education and/or Experience:

Education: High school diploma or equivalent GED

Experience:

- Strong Proficiency and knowledge of Microsoft Excel, Word, PowerPoint, Outlook and Google Applications;
- Experience and proficiency working with a donor database, Altru or similar;
- 5-7 years working in an administrative role;
- Previous experience working in a not-for-profit a plus;
- Previous experience working in an environment with many volunteers a plus.

Skills and Abilities:

- Demonstrate excellent written and verbal communication skills;
- Communicate (listening and speaking) effectively with donors, vendors and employees of the organization;
- Confidence in handling both face-to-face and telephone interactions with donors;
- Provide excellent planning and project management skills;
- High proficiency in a PC, Windows environment and Microsoft Office products as well as Google Applications;
- Demonstrate a strong customer service orientation;
- Work independently while maintaining open and transparent communications about duties and project status, within the bounds of the area of responsibility and authority;
- Demonstrate consistent and exceptional attention to detail, resourcefulness and an ability to think through an issue and anticipate possible problems, obstacles, and conflicts;
- Be organized and follow through on tasks to a successful completion;
- Display impeccable discretion, confidentiality, judgment, graciousness and flexibility at all times;
- Take direction, multi-task and work in an environment of regular interruptions;
- Work and communicate successfully with a highly diverse population of staff, volunteers, members, Board Members, donors and the public;
- Serve as a collaborative team member with strong interpersonal skills and a sense of humor;
- Read and interpret documents such as safety rules, operation and maintenance instructions and procedural manuals.

CERTIFICATES, LICENSES, REGISTRATIONS

A valid Driver's License is required.

PHYSICAL REQUIREMENTS

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry items up to 20 pounds;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend frequently as well as sit for long periods at a computer.

HOW TO APPLY

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to:
<https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

Please visit our website for more information: www.filoli.org
Filoli is an equal opportunity employer who values diversity in the workplace.