



Development Information 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 Information Assistant provides a wide variety of skilled administrative support for the development and membership programs, as well as senior staff and Committees of the Board of Directors. This position will interact with donors and members and have access to confidential donor information which requires considerable use of tact, diplomacy, discretion, and judgment. This position assumes responsibilities for special projects and development documentation management, and develops reports and data for management decision making. This position will also maintain membership data, assist with membership drives, generate mailing lists and reports and communicate with Filoli members and potential members.

The Development Information Assistant directly supports the Development Manager, the Chief Development Officer (CDO), the Chief Executive Officer (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. The hourly rate is \$31.00. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), 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

- Provide 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 tracking donor interactions and moves management, clean-up and entry projects; maintain data entry standards for consistency; serve as a database expert;
- Assist with filing and updating electronic files on the Filoli main server, including grant documentation, acknowledgment letters, and solicitation materials;
- Provide direct data entry and produce acknowledgement letters for gifts and in-kind donations in an accurate and timely fashion;
- Track and fulfill requests for donations from external parties;
- Engage in direct donor stewardship based on department guidelines, particularly that mid-level and major donors received notes, phone calls and invitations from CDO and Development Manager;
- Support and execute Development department events and activities;
- Manage special gifts and related supplies including Filoli collateral and products;
- Manage, track and fulfill community nonprofit donation requests;
- Serve as the contact, scheduler and presenting member for the Speaker's Bureau;
- Work regularly with confidential information and ensure its security;

Administrative Support

- Provide administrative and clerical support to development and membership departments;
- Serve as secondary membership data entry, trained in all areas of support for membership function and trained in Altru to be able to provide assistance as needed in any area;
- Create development mailings including list management, mail merges and mailing production;
- Prepare correspondence, bulletins and communications, with particular attention to high level formal communication standards;
- Manage development and membership department filing systems, including individual donor files, both hard copy and electronic;
- Provide general office management support including ordering and maintaining supplies, managing copies and mail systems and coordinating materials needed for projects;
- Occasionally assist with Visitor Services for membership, events, and ticket sales transactions;

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.

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

Core Competencies:

- **DEVELOPMENT AND MEMBERSHIP ADMINISTRATION EXPERIENCE** – Two to three years working in an administrative role. Previous experience working in a nonprofit is a plus.
- **PEOPLE, PROJECT, AND PROGRAM SKILLS** – Provide excellent planning and project management skills. Effective cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires.
- **LEADERSHIP** – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively and build partnerships with Filoli's many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **CULTURAL COMPETENCIES** – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- **DIVERSITY, EQUITY, AND INCLUSION** – Committed to Filoli's dedication to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.
- **COMMUNICATION SKILLS** – 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.
- **DECISIVE NATURE** – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions with understanding of the inherent risks and the implications of decisions.
- **COMPUTER SKILLS** – High proficiency in a PC, Windows environment and knowledge of Microsoft Excel, Word, PowerPoint, Outlook and Google Applications. Experience and proficiency working with a donor database (Altru or similar product).
- **AVAILABILITY** – Maintain a flexible work schedule that may include evenings and weekends to meet the demands of executive management.

Skills and Abilities:

- 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, 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.**