



## **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 2024-2028 Strategic Plan and Capital Campaign. 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.

Are you interested in contributing to a vibrant, expanding non-profit? Apply for the Development Information Assistant position today!

### **SUMMARY**

The Development Information Assistant is the cornerstone of the growing and dynamic Filoli development team, supporting the department's fundraising efforts through meticulous donor database management (Altru) and strong organizational skills. You will handle data entry, donor interaction entry, acknowledgment letters, file management, and donor research, ensuring smooth and accurate tracking. Additionally, you'll provide essential donation and revenue reports, assist with event support, and manage development inventories.

In this role, you will also respond to donor inquiries, secure confidential information, and support department mailings. Flexibility and a team-oriented mindset are crucial to adapting to the organization's evolving needs.

This position is full-time, non-exempt and hourly. Depending on candidate experience, the hourly rate range is \$31.00 to \$33.00. This position is also eligible for employee benefits:

medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. This position will have flexible scheduling including weekend/evening service as needed. The schedule will be based on business needs so flexibility will be important.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:**

### **Development**

- Regularly update the donor database management (Altru), including data entry and clean-up, entering and tracking donor interactions and supporting systems for managing donor and prospect relationships, file uploads;
- Produce accurate donor acknowledgment letters within 2 business days of receipt of a gift;
- Conduct research and prepare donor profiles for selected donors/prospects, prepare proposal materials, support prospect management;
- Provide donation reports as requested, including weekly giving reports and monthly revenue reporting;
- Work regularly with confidential information and ensure its security;
- Responsible for replying to general Development inquiries and triaging requests for donors, Board and Committee Members, staff and the public in a prompt, friendly, and service-oriented manner;
- Support Development department events and activities including gathering and preparing supplies, assisting with event guest registrations, transacting donations received at fundraising events;
- Assist with development mailings including list management, mail merges and mailing production;
- Provide general office management support including ordering and maintaining general supplies, file organization, managing copies and mail systems and coordinating materials needed for projects;
- Maintain development inventories, such as the donor gift supply, donated beverage inventory, and development collateral to support solicitation activity, tracking usage;

### **General**

- 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 see projects through to completion dependably;
- 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;

## 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 ADMINISTRATIVE 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 project coordination and execution with a high attention to detail. Effective cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires.
- WORKING STYLE – 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. Possess a growth mindset and engage proactively in continuous learning.
- 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 DEI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion. View racial and cultural differences as assets to the organization.
- 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.
- 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 effective communication about duties and project status;
- 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 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 perform the essential functions of this job including: successfully

- 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](http://www.filoli.org)

Filoli is an equal opportunity employer who values diversity in the workplace.