

MONTEREY BAY AQUARIUM

Title

Senior Development Admin Assistant – Gift Planning

Reporting Relationship

Vice President of Gift Planning

Job summary:

The Senior Development Assistant for Gift Planning provides administrative support for our gift planning and endowment programs, including cultivation and stewardship for Ocean Legacy Circle (OLC) donors and prospects. Works with the Gift Planning Officer to support the implementation of our marketing and communications strategies and provides program reports. Provides excellent customer service to members and donors.

Core Responsibilities

- Serves as primary administrative contact for gift planning and endowment programs, including responding to inquiries, facilitates information and welcome packets, and other mailings and tasks as assigned. Performs data entry of the inquiries, mailings, and set up follow up actions for VP of Gift Planning and Gift Planning Officer
- Performs accurate and timely data entry for Ocean Legacy Circle records and maintains paper and electronic for confidential records for OLC donors and bequests. Performs data entry audits and clean up
- Serves as primary administrative contact for planned giving and endowment donors and prospects, including responding to emails, letters and phone calls in a timely manner. Makes arrangements for tours, lunch reservations, parking for onsite meetings. Contacts donors as needed to confirm recognition details
- Makes cultivation and stewardship—“discovery” calls to prospects including Charter and loyal members
- Working with the Gift Planning Officer and development staff, implements marketing and communications strategies and outreach efforts including mailings, emails, surveys, website; print materials, ads, events and recognition for OLC donors
- Working with the Gift Planning Officer, prepares monthly reports for finance and accounting staff and processes trust documents; responds to requests for documents and recommended language from trustees, attorneys and financial advisors. Processes purchase orders and invoices, and tracks program expenses.
- Prepares monthly and annual program reports; runs lists and queries, as needed
- Prepares annual endowment reports for donors and provides support for Annual Review mailing as needed
- Creates lists for Shorelines publication; maintains records for donor photos and permissions to use in marketing gift planning and endowment programs
- Provides administrative support for gift planning and OLC events including invitation mailing and email, tracking RSVPs and follow up communications in the database
- Maintains directory of professionals: estate planning attorneys, financial advisors, accountants
- Provides administrative support for Vice President of Gift Planning and Gift Planning Officer
- Provides administrative support for and attends donor events as needed (requires some nights and weekends)
- Provides back-up administrative support for Development Assistants with membership data entry and fulfillment and monthly renewal reminders for Ocean Legacy Circle at member and donor levels below \$2,500 level

Absolutely Required Skills / Knowledge / Ability / Experience or Education

- Minimum four year degree or equivalent experience
- Two years of development/fund raising administrative experience in a non-profit organization
- Strong organization skills and attention to detail
- Strong proofreading skills
- Excellent customer service and written/oral communications skills
- Advanced computer skills including Microsoft Word and Excel
- Proficient working in data base programs

Desired Skills / Knowledge / Ability / Experience or Education

- Two years working in gift planning in a non-profit organization preferred

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- Proficient working in Raiser's Edge database program
- Administrative experience in law office

Ancillary Responsibilities

- Prepares data base queries and exports
- Provides basic explanation of gift planning options
- Solicits annual contributions as appropriate
- Provides assistance to donors with membership renewals, memorial and tribute gifts

ESSENTIAL ELEMENTS: JOB FUNCTION (A)

Job Title: Senior Development Admin Assistant

Job Number: 1085

Date Updated: 6/6/17

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Essential elements to perform job function:

Physical

- | | | |
|--|--|---|
| <input checked="" type="checkbox"/> Seeing, general | <input type="checkbox"/> Smelling | <input checked="" type="checkbox"/> Bending |
| <input checked="" type="checkbox"/> Close vision | <input type="checkbox"/> Tasting | <input checked="" type="checkbox"/> Sitting |
| <input type="checkbox"/> Color perception | <input checked="" type="checkbox"/> Walking | <input checked="" type="checkbox"/> Squatting |
| <input checked="" type="checkbox"/> Hearing/Listening | <input checked="" type="checkbox"/> Lifting | <input type="checkbox"/> Flexibility required of: |
| <input checked="" type="checkbox"/> Clear Speech-Simple | <input checked="" type="checkbox"/> Carrying | <input type="checkbox"/> Upper Body |
| <input checked="" type="checkbox"/> Clear Speech-Complete | <input checked="" type="checkbox"/> Pushing | <input type="checkbox"/> Lower Body |
| <input checked="" type="checkbox"/> Touching | <input type="checkbox"/> Pulling | <input checked="" type="checkbox"/> Standing |
| <input checked="" type="checkbox"/> Dexterity required of: | <input type="checkbox"/> Climbing | <input type="checkbox"/> Running |
| <input checked="" type="checkbox"/> Hand(s) | <input type="checkbox"/> Kneeling | <input type="checkbox"/> Driving |
| <input checked="" type="checkbox"/> Finger(s) | <input type="checkbox"/> Stooping | |

Work Environment

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> Works Alone | <input type="checkbox"/> Outside Confined Areas | <input type="checkbox"/> Electrical Equipment |
| <input checked="" type="checkbox"/> Works with Others | <input type="checkbox"/> Extreme Heat | <input type="checkbox"/> Pressurized Equipment |
| <input checked="" type="checkbox"/> Works around others | <input type="checkbox"/> Extreme Cold | <input type="checkbox"/> Burning Materials |
| <input checked="" type="checkbox"/> Verbal Contact with Others | <input type="checkbox"/> Temperature Changes | <input type="checkbox"/> Moving Objects |
| <input checked="" type="checkbox"/> Face-to-Face Contact | <input type="checkbox"/> Wet and/or Humid | <input type="checkbox"/> High Places |
| <input checked="" type="checkbox"/> Shift Work | <input type="checkbox"/> Noise | <input type="checkbox"/> Fumes/Odors |
| <input type="checkbox"/> Extended Day | <input type="checkbox"/> Vibration | <input type="checkbox"/> Dirt/Dust |
| <input checked="" type="checkbox"/> Inside | <input type="checkbox"/> Mechanical Equipment | <input type="checkbox"/> Gases |

Mental

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Reading-Simple | <input checked="" type="checkbox"/> Writing-Complex | <input checked="" type="checkbox"/> Math Skills |
| <input checked="" type="checkbox"/> Reading-Complex | <input checked="" type="checkbox"/> Clerical | <input checked="" type="checkbox"/> Judgment |
| <input checked="" type="checkbox"/> Writing-Simple | <input checked="" type="checkbox"/> Memorization | <input checked="" type="checkbox"/> Decision-Making |
| <input checked="" type="checkbox"/> Analyzing | <input checked="" type="checkbox"/> Perception/Comprehension | |

Physical demands checklist (may add up to more than 100%)

	Frequency
Sitting	85%
Standing	15%

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Walking	10%
Bending	5%
Stooping	0%
Climbing	%
Lifting*	5%
Carrying**	5%
Squatting	5%
Kneeling	%
Twisting	%
Pushing/Pulling***	5%
Seeing	90%
Hearing	75%
Speaking	60%

	Weight	Distance	Height
			(to waist, over shoulders, etc.)
*Lifting	25 Pounds	5 Feet	Waist
**Carrying	25 Pounds	15 Feet	Waist
***Pushing/Pulling	50 Pounds	20 Feet	