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Jewish Federation*
OF PALM BEACH COUNTY

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Position: Donor Information Services (DIS) Specialist

Reports to: Donor Information Services Manager

Position Summary:

The DIS Specialist is responsible for ensuring the data in the Donor Management System is entered quickly with accuracy and according to relevant business processes. Audit of entries and reconciliation is also a large task of the position.

Essential Duties and Responsibilities:

- Add pledges, tributes, and payments, against campaign and constituent in the Federation donor database
- Process payments such as: credit cards, online payments, stock transactions, split checks, bonds, checks of various types, including but not limited to Canadian, Foundation and Trust
- Process pledge and payment adjustments as needed
- Collect and process payments from events
- Complete intra-company fund transfer forms for Designated, Capital, and other special campaigns as necessary
- Process financial correspondence related to charitable giving, including invoices, matching gifts, IRA letters, stock donations, and tax receipts
- Maintain delinquency reports and make collection calls or mail collection letters as needed
- Maintain check logs for payments received and payments not processed by DIS
- Process mail, i.e. receive payments and/or pledge cards, enter into system or forward copy to the Campaign Staff for creation of the pledge card
- Create and maintain constituents, including but not limited to new accounts, demographic information changes, managing deceased constituents, merging and inactivating accounts
- Daily reconciliation of campaign totals; daily data entered vs. daily beginning total
- Conduct weekly/monthly audits of data entry to ensure accuracy
- Answer customer service inquiries from donors and staff regarding financial data
- Reconciliation of constituent accounts as necessary
- Research returned mail and update system
- Maintain filing in timely and orderly fashion for ease of retrieval
- Perform other duties as assigned

Qualifications and Success Factors:

- High school diploma plus demonstrated ability to satisfactorily meet the above requirements during a probation period
- Minimum of 2 years' experience in data entry
- Strong knowledge of office computing (Microsoft Office Proficiency – Word, Excel)
- Excellent customer service, interpersonal, and communication skills required
- Highly organized with proven ability to manage multiple tasks
- High attention to detail, demonstrated ability to follow-up proactively

The Jewish Federation of Palm Beach County is an Equal Opportunity Employer.