

Position: DIS Specialist

Reports to: Manager, Donor Information Services

Position Summary:

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

Essential Duties and Responsibilities:

- Add Pledges, Tributes, Payments, and Payroll Deductions against campaign and constituent in Federation donor database.
- Process payments such as: credit cards, on-line payments, stock transactions, split checks, bonds, checks of various types, including but not limited to Canadian, Foundation and Trust.
- Process pledge adjustments as needed.
- Collect payments from events and enter into system.
- Complete intra-company fund transfer forms for Designated, Capital, TTC and other special campaigns as necessary.
- Reconciliation of constituent accounts as necessary.
- Specialty areas will be assigned during assessment period.
- Create and maintain constituents, including but not limited to new accounts, demographic information changes, managing deceased constituents, merging and inactivating accounts.
- 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.
- Maintain check logs for payments received and payments not processed by DIS.
- Daily reconciliation of campaign totals; daily data entered vs. daily beginning total.
- Answer internal (staff) and external (donors) questions regarding financial data.
- Research returned mail and update system.
- Maintain filing in timely and orderly fashion for ease of retrieval.
- Perform other duties as assigned.
- Willing to work in the office in a safe working environment.

Qualifications and Success Factors:

- High school diploma plus demonstrated ability to satisfactorily meet the above requirements during a probation period.
- Advanced excel skills with minimum of two years' experience.
- CRM data entry experience preferred.
- Effective customer service skills required.
- Effective interpersonal and communication skills required.
- Highly organized with proven ability to manage multiple tasks.
- High attention to detail, demonstrated ability to follow-up proactively.
- Strong knowledge of basic office computing.

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