Position: DIS Specialist
Reports to: Manager, Donor Information Services (DIS)
FLSA Classification: Non-exempt
Department: Finance/Donor Information Services (DIS)
Full/Part Time: Full-time

Organization Summary:
Jewish Federation of Palm Beach County is a 501(c)3 nonprofit organization dedicated to transforming, inspiring and saving lives in the Palm Beaches and 70 countries around the world. Each year, Jewish Federation inspires thousands of community members to contribute, volunteer and participate in programs that generate more than $50 million to leading a powerful impact in the community.

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:
- Adds Pledges, Tributes, Payments, and Payroll Deductions against campaign and constituent in Federation donor database.
- Processes 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.
- Processes pledge adjustments as needed.
- Collects payments from events and enters into system.
- Completes intra-company fund transfer forms for Designated, Capital, TTC and other special campaigns as necessary.
- Reconciles constituent accounts as necessary.
- Responsible for specialty areas as assigned during assessment period.
- Creates and maintains constituents, including but not limited to new accounts, demographic information changes, managing deceased constituents, merging and inactivating accounts.
- Processes mail, i.e., receives payments and/or pledge cards, enters into system or forwards copy to the Campaign Staff for creation of the pledge card.
- Maintains check logs for payments received and payments not processed by DIS.
- Reconciles campaign totals daily; daily data entered vs. daily beginning total.
- Answers internal (staff) and external (donors) questions regarding financial data.
- Researches returned mail and updates system.
- Maintains filing in timely and orderly fashion for ease of retrieval.
- Other duties as assigned.

Qualifications and Success Factors:
- High school diploma or equivalent required, preference for Associates Degree or better.
- Two or more years’ experience using Excel, data entry, account reconciliation, processing payments or equivalent combination of relevant education, experience and skills required.
- CRM data entry experience preferred.
- Excellent customer service skills required.
- Excellent written and verbal communication skills required.
• Excellent organizational skills with meticulous attention to detail and ability to multi-task, prioritize and manage multiple projects.
• Strong knowledge of basic office computing, including MS Office (Outlook, Word, Excel, PowerPoint, Teams), Zoom and basic database skills required.
• Proficient in working with customer relationship management (CRM) databases.
• Demonstrated ability to follow-up proactively.
• Ability to work in a fast-paced environment, meet deadlines, prioritize tasks, multi-task, respond to urgent matters, and pay attention to detail.
• Ability to handle sensitive information with discretion and maintain confidentiality when dealing with documents, conversations, and situations.
• Must be able to perform in fast-paced, deadline-driven environment.
• Must be able to work effectively on a team and independently as needed.
• Must be able to pass Level 1 background check including credit report.

Compensation and Benefits:
In addition to a competitive salary, Jewish Federation of Palm Beach County currently offers the following benefits:
• A comprehensive benefits package including 15-25% of employee-only premiums paid for medical and dental and 100% of premiums paid for vision insurance.
• Federation contributions toward HSA accounts.
• Federation-paid Life/AD&D policy.
• Federation-paid long-term disability (LTD) insurance.
• Medical and dependent-care Flexible Spending Accounts (FSA).
• Hybrid work schedule.
• Professional development and training opportunities.
• Paid vacation and sick leave.
• Generous paid holiday schedule.

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

Federation strongly encourages applications from individuals with varied identities and backgrounds. As an equal opportunity employer, all individuals are encouraged to apply without regard to race, color, religion, age, disability, national origin, gender, sexual orientation, marital status, ancestry, genetic information, medical condition, veteran status, financial status, or any other class protected under federal, state, or local laws.

Federation is committed to the full inclusion of all qualified individuals. If accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact Mary Kay McGann at mary.kay.mcgann@jewishpalmbeach.org for assistance.

To apply online, please visit our career’s page. Or email your resume and cover letter to: HRrsvp@jewishpalmbeach.org.

NO CALLS, PLEASE.