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EMPLOYMENT LISTING

Development Assistant

St Louis, MO

Summary: Principia is looking for a Development Assistant. In this role, you play a crucial part in advancing the overall development goals, which encompass the growth of revenue, increased donor engagement, and the achievement of fundraising targets. Your responsibilities extend to coordinating and supporting activities related to the Sr. Director of Development, Principal Gifts Officer, and Development Field Officers in the efforts to advance donor relationships and ensuring the efficient functioning of the Development Office, coordinating its various activities seamlessly.

Primary Responsibilities

- Development Team Support – Supports Sr. Director of Development and Development Officers in:
 - Updates donor database, ensuring up-to-date and accurate records
 - Reconciles credit card statements
 - Provides calendar support
 - Prepares agendas for departmental meetings, takes notes and follows up on action items
 - Coordinates with other Advancement offices including Advancement Services, Alumni and Field Relations, PLL, Stewardship and Funds, and the CFO and Accounting office
- Donor Relations
 - Assists in the preparation of donor materials, presentations, and reports
 - Generates development profiles for development officers
 - Coordinates special donor communications Responsible for the operational aspects of special donor meetings, including agenda creation, scheduling, travel arrangement, event planning, conference call logistics, action item identification and follow-up
- Process Gifts
 - Receives and submits donor gifts to gift services team
 - Creates and sends receipt letters on behalf of development officers
 - Handles confidential information with discretion and professionalism

- Support broad advancement initiatives and events, including Reunions and Giving Tuesday

Planned Giving Program Responsibilities

- Maintain BNY Mellon Wealth Services relationship including monthly conference calls and individual phone/email contacts for tracking Principia's planned and stock gifts; handling of termination process of all CGAs, PIFs, and CRTs
- Work with donors in several important areas including: first line provider for inbound donor inquiries; the preparation and coordination of donor mailings; the coordination of the planned giving receipt thank you letters; follow-up correspondence with donors
- Responsible for 1898 Legacy Society stewardship
- Manage processing and oversight of charitable trust and gift annuity agreements, gift and tax calculations, and related correspondence. Manages and processes gifts of securities including gift receipts, tax filings, and related documents
- Understand basic concepts and techniques of planned giving and applicable federal and state tax laws/regulations and provides current information and resources for development staff
- Produce year-end trust valuation letters; financial performance reports; trust and beneficiary tax reporting
- Develop, maintain and update gift planning procedures and policies

Core Competencies

- **Team player:** Ability to collaborate and partner with peers and senior leaders is critical, with an ability to listen, give and receive feedback, and be comfortable exchanging ideas and speaking candidly in a professional and collegial manner
- **Interpersonal Skills:** Strong interpersonal skills and the ability to work effectively and professionally with candidates and staff at all levels and build strong relationships
- **Ethical:** Treats people with respect; keeps commitments; inspires the trust of others; works with integrity; upholds organizational values
- **Dependability:** Works within deadlines and under occasional heavy workloads
- **Planning and Organizing:** Prioritizes and plans work activities; uses time efficiently; manages multiple projects and tasks simultaneously
- **Quality:** Demonstrates attention to detail, accuracy, and thoroughness

Minimum Qualifications

- Student of Christian Science
- Supportive of Principia's mission, vision, and values as articulated here <https://www.principia.edu/about/mission>
- Bachelor's degree preferred
- Relevant work experience
- Excellent communication skills
- Proficient with Microsoft Office suite; able and willing to learn new software applications as needed
- Enthusiastic commitment to and understanding of Principia's Purpose and Policies, and Advancement objectives

The statements above describe the general nature and level of work but are not a complete list of responsibilities and are subject to change at the discretion of Principia.

Equal Opportunity

Principia, a mission-driven institution, believes every person has the right to an equitable and respectful educational environment and workplace. Principia does not discriminate on the basis of race, color, national origin, ethnicity, gender (identity or expression), sexual orientation, family status, disability, age, or military or veteran status.

In hiring, admissions, and related decisions, Principia—as an institution with a religious mission—gives preference, where appropriate, to Christian Scientists.

For more information: www.principia.edu/jobs; Beth.Trevino@principia.edu; 618-374-5202

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