



## JOB DESCRIPTION

**Position : Operations Associate**  
**Department : United Jewish Endowment Fund**  
**Reports to : Deputy Director, UJEF**  
**Date : February 2019**

The Jewish Federation of Greater Washington is a non-profit philanthropic organization dedicated to creating a vibrant and purposeful Jewish community. Federation cares for those in need, deepens engagement in Jewish life, and strengthens the bonds among Jews in the Washington area, in Israel, and around the world. Its primary functions are community planning and allocations, financial resource development, and leadership development.

The United Jewish Endowment Fund (Fund) of The Jewish Federation of Greater Washington, founded in 1976, was created to allow community leaders and philanthropists to establish funds that would support the Jewish community in perpetuity. The Fund is a division of the Federation that has a separate Board of Trustees. Its Board of Trustees is independently responsible for the development and monitoring of Fund policies including resource development, planning, budgeting, grant-making and investing. The Fund also makes grants throughout the Jewish community that support innovation and creativity. Today the Fund manages approximately 500 funds.

The Operations Associate supports the administration and operations of the Endowment Fund, including drafting and sending correspondence, organizing mailings, organizing and implementing meetings, and tracking and responding to donor requests. This team member must be a detail-oriented individual who can focus on logistics, such as travel, scheduling, balanced with the ability to manage projects working with a variety of stakeholders and team members. Project management is an important part of the Operations Associate's role.

The Associate will help the Endowment Fund develop systems useful for smooth operations. A successful candidate will have the technical skills to quickly learn the complex software that manages a wide range of endowment funds and the communication skills and grace to work with our donors. As part of a team, the Associate must work comfortably with team members, communicate clearly and be willing to help the team with whatever tasks arise. He or she must also be willing to work independently, take responsibility for completing his or her work, and anticipate the steps needed to complete his or her responsibilities.

### Responsibilities:

- Prepare gift documents (e.g. contracts, annuity agreements, etc.) as needed to create new endowment funds and amend existing funds
- Draft minutes for key committees including the Investment Committee and Board of Trustees meetings, which include sophisticated discussions about alternative investments and investment strategy and organizational policy decision.

- Assist Investment Committee's process, monitor, and organize UJEF investments and reporting requirements
- Assist Finance Department team and accounting firm with yearly audit as pertains to Endowment transactions and documentation
- Prepare reports and dashboards, as required
- Research donor information, policy and procedures and other items, as needed, including the use of existing files and a variety of other research resources to develop information for Endowment Fund administration
- Work independently to fill gaps, prioritize, and manage the departmental needs
- Independently respond to situations or inquiries as appropriate
- Manage routine correspondence in a timely and efficient manner, including letters, memoranda, reports, invitations, forms, lists, agendas and back up for gift acknowledgements
- Organize and send quarterly statement mailings to fund donors
- Track expectancies and manage reporting of expectancies
- Serve as backup for philanthropic fund services and donor services specialists in the administration of fund distributions, gift acknowledgment, key donor insurance program, etc.
- Perform other duties as assigned

#### Qualifications and Experience:

- Bachelor's degree (or equivalent) with a minimum two years of nonprofit or related experience or relevant advanced degree
- Excellent verbal, written and digital communication skills that are effective with a diverse range of audiences such as trustees, lay leaders, volunteers, our internal team members, donors, vendors and potential funding partners.
- Strong research and report-generating skills
- Proficient in Microsoft Office including Word, Excel, Power Point and Outlook
- Ability to convey a high degree of commitment and passion for Federation and the Endowment Fund's mission
- Ability to maintain a high level of confidentiality
- Exceptional understanding of philanthropy as it relates to the not-for-profit organization and knowledge of fundamental disciplines of resource development
- The ability to work independently and as part of a team; detail oriented, well organized, focused and goal oriented, with a high level of initiative and energy, as well as problem solving skills.
- Prior experience in a database management as well as knowledge of CRM database preferred
- Knowledge of the local Jewish community and agencies, a plus.