



UNITED WAY OF CENTRAL OHIO JOB POSTING

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| JOB TITLE: | Donor Services Coordinator |
| DEPARTMENT: | Finance/Operations |
| REPORTS TO: | Donor Services Manager |
| GENERAL DESCRIPTION: | Serves as a key contact and compliance researcher for participating agencies relating to donor designated gifts. Assists with the processing of donor choice payouts and preparation of related reconciliations and audit schedules according to pre-determined schedules for assigned combined campaigns. |
| JOB RESPONSIBILITIES: | <ul style="list-style-type: none"> • Serve as primary contact to agencies and donors as it relates to designations. Build and sustain on-going relationships with donors, agencies and key personnel within organizations to ensure donor pledges are paid in accordance with their eligible designation choices. • Resolve donor or agency questions regarding designations. Provide appropriate telephone and/or written communication regarding designation policies and procedures. • Assist with maintaining accurate payout parameters within donor database for proper payout processing. Reconcile and analyze donor designation reports for completeness and accuracy. • Monitor write-in designation reports and assist with coordinating donor communication of ineligible designations and alternate designation choices. Ensure appropriate updates are made to donor records in the database. • Research donor designated agencies using the Guide Star database. Retrieve and maintain documentation to support UWCO's compliance with IRS and UWW guidelines related to agency verification of tax-exempt status and exclusion from terrorist watch lists. • Research donor designated agencies using the Ohio Attorney General's database. Retrieve and maintain documentation to support compliance with state and local solicitation guidelines. • Maintain donor choice structure in the campaign database for UWCO local and regional campaigns. Add and/or update agency accounts and contact information within the ANDAR, CRM and accounts payable databases as needed. • Assist with the production and distribution of communication to agencies related to the UWCO donor choice program and donor designations. • Respond to donor inquiries or responses to acknowledgements via phone, email and/or US mail. Work with other Finance and/or Resource Development staff to resolve issues and update records accordingly. • Generate, reconcile and process regular payouts for assigned campaigns according to pre-determined schedule under supervision of Donor Services Manager. Work with public sector staff to verify status of agencies eligible for designations within each combined campaign. • Assist with the preparation of assigned financial schedules for combined campaign annual audits. • Manage process of updating and recording agency EFT banking information. • Assist with the research and resolution of returned or unclaimed payments to agencies. • Process all donor stock donations. Communicate regularly with UWCO broker and also with various donor broker representatives. Prepare acknowledgement letters for signature by Sr. Vice President of Finance. Communicate with |

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| | <p>Resource Development and Leadership Giving staff regarding any questions or issues on stock donors.</p> <ul style="list-style-type: none"> • Maintain the Online Agency Reporting site used to report donor and agency information for all agencies and federations. Monitor agency access and send out necessary e-communications. Respond to inquiries and provide updates as needed to agencies throughout the year. • Provide support in other areas of the Finance Department as assigned. • Consistently adhere to inter-departmental, volunteer and customer service standards. • Demonstrate knowledge of and support for United Way Mission, Vision, Value Statements, Service Standards, Confidentiality Standards, and Policies and Procedures. |
| <p>JOB QUALIFICATIONS:</p> | <ul style="list-style-type: none"> • Work requires good interpersonal, written and verbal communication, and customer service skills to handle inquiries into designations and account balances. • Work requires detail oriented work habits, strong analytical and research skills and ability to understand the big picture. • Work requires general knowledge of computer accounting, calculator and typing skills of 35 WPM. Advanced knowledge in Excel and Word required. • Thorough appreciation and acceptance of, and commitment to, diversity. |
| <p>EDUCATION AND EXPERIENCE:</p> | <ul style="list-style-type: none"> • High school diploma or equivalent and a minimum of two years experience; or combination of college degree and experience to equal a total of at least four years. |
| <p>LISTING DETAILS:</p> | <ul style="list-style-type: none"> • Posting date: September 1, 2017 • Application deadline: September 11, 2017 • Please submit your resume & cover letter no later than the application deadline to the following URL address: https://liveunitedcentralohio.org/careers/ <p>Please Note:</p> <ul style="list-style-type: none"> • Applicants will see a message after successfully completing the online application process. <u>If a message does not appear, then the application was not successfully completed.</u> Please re-submit your application or call 614.227.2700 if you have submission issues. |
| <p>OTHER:</p> | <p>United Way is an Affirmative Action/Equal Opportunity Employer.</p> |