



Unity Foundation of La Porte County

DONOR SERVICES ASSOCIATE JOB DESCRIPTION

REPORTS TO: Vice President
PAYROLL STATUS: Salary
OVERTIME CLASS: Exempt

I. **JOB SUMMARY:**

The Donor Services Associate reports to the Vice President and will oversee Unity's regular transactions including accounts payable, donation/grant entries, deposits, acknowledgements, profile entries, financial statement distribution and STAR Center invoicing. This position also interfaces with and supports the Unity team, donors, committees, board members and community members as necessary.

II. **QUALIFICATIONS DESIRED FOR THIS POSITION:**

A. **PROFESSIONAL/TECHNICAL ABILITIES:**

- Professional/Educational preparation and experience in related field
- General banking, bookkeeping and/or strong attention to detail and accuracy
- Experience working with customers doing transactions
- Knowledge and skills in computer system/software applications (including Microsoft Office/Office 365); knowledge of database management
- Effective oral and written communications; Effective organizational and time management skills
- Aptitude to continuously learn, grow and adapt to change

B. **PERSONAL CHARACTERISTICS:**

- Exhibits a commitment to serve the communities of La Porte County
- Demonstrates ability to work with diverse people and groups with courtesy, friendliness, and consideration
- Ability to work collaboratively, as a team player
- Thinks independently and creatively, and willing to learn and grow
- Remains flexible and successful within changing environment and demands
- Exercises good judgment and decision-making capabilities
- Shows evidence of dependability and effective work habits and maintains professional image
- Maintains strict confidentiality of Unity and donor information

III. **WORKING CONDITIONS:**

A. PHYSICAL DEMANDS: Must have the schedule freedom to work varying hours, including evenings when necessary. Sitting, standing, walking, and lifting are included. Acute verbal, hearing, and visual senses required for communication. Work environment includes various locations in office and public. Manual dexterity and visual capability to use computer, audio/visual, and general office equipment are necessary. The position may include lifting and carrying up to 40 lbs.

B. MENTAL DEMANDS: Must be able to work under moderate to high stress.

IV. DUTIES AND RESPONSIBILITIES:

A. ADMINISTRATIVE - TRANSACTIONS

- Makes weekly bank deposits and enters deposit information into C-Suite
- Enters all cash receipts and processes all tax acknowledgement letters
- Coordinates the accounting for gifts with appropriate personnel
- Provides appropriate financial reports, documents, and data as requested by the Vice President
- Assists in the preparation of fund statements for all funds and provides additional communication to fund representatives as needed
- Enters and processes accounts payable
- Processes grant and scholarship payments in partnership with Vice President and Marketing & Program Manager
- Creates monthly Consent Agenda for Executive Committee and Regular Board Meetings.

B. DATABASE MANAGEMENT

- Maintains and updates profiles in database, includes new contacts, deceased contacts, inactive contacts, profile links, and profile types
- Keeps current on new releases in the database software and notifies affected staff of enhancements

C. STAR CENTER

- Entertains concerns of tenants and vendors of services as they arise
- Interfaces with and updates STAR Center Landlord and Vice President on any concerns
- Greets visitors to Unity and guests of other STAR tenants

D. OTHER

- Processes daily mail, scans and enters incoming donations
- Answers phone and directs constituents with the utmost professionalism
- Maintains procedures manual for the Donor Services Associate
- Interfaces with and supports Unity team, donors, committees, board members and community members as necessary.
- Accepts other duties as assigned, as they relate to the daily operation and management of Foundation activities

V. HOURS AND COMPENSATION

- ♦ Full-time, Salary, Exempt, Benefits-eligible
- ♦ Compensation commensurate with individual experience and qualifications

Interested applicants may contact Shannon Walker, Unity Foundation Vice President, at swalker@uflc.net.