



United Way
of Greater Toledo

UNITED WAY OF GREATER TOLEDO JOB DESCRIPTION

<u>Position Title:</u>	PLEDGE & PAYMENT PROCESSING ADMINISTRATOR
<u>Department:</u>	DONOR SERVICES
<u>Location:</u>	TOLEDO OFFICE/HYBRID
<u>FLSA Job Status:</u>	FULL TIME, NON-EXEMPT
<u>Hourly Rate:</u>	\$18.00
<u>Organizational Relationships:</u>	
<u>Reports to:</u>	MANAGER, DONOR SERVICES
<u>Supervises:</u>	N/A
<u>Coordinates with:</u>	ALL DEPARTMENTS AS NECESSARY
<u>Date Created:</u>	March 2009
<u>Date Revised:</u>	April 2022

STATEMENT OF THE JOB:

The Donor Services Department is responsible for overseeing pledge processing, e-Pledge setup and administration on level 1 & 2 accounts, responding to customer service requests, and data integrity. Additional responsibilities include processing of thank you letters, tax receipts, and agency designation acknowledgements. The Pledge & Payment Processing Administrator is responsible for processing all pledge and payment applications into ANDAR and includes significant data management and departmental report generation.

The position will have direct contact with external customers (donors, companies, designated agencies and other United Ways) and internal customers (staff, fellows, volunteers, and others).

ESSENTIAL FUNCTIONS:

- Coordinate the day-to-day pledge receivables process, ensuring a timely entry of pledge and payment application into fundraising software (Andar).
- Reconcile e-pledge payments.
- Process monthly credit card payment applications.
- Process monthly, quarterly, annual billing statements.
- Complete all corrections/adjustments and write-offs into fundraising software.
- Work closely with Resource Development (RD) and Finance departments to ensure accurate application of pledges/payments.
- Review data for discrepancies, request clarification, and advise the supervisor of issues related to data.
- Assist in the annual internal audit process.
- Provides department customer service support, responding to internal and external customer requests.
- Complete data maintenance tasks per schedule and advise Donor Services Manager of discrepancies or issues that may compromise data integrity.

- Assist Donor Services staff to update write-in designations, research new designations, and coordinate with Finance to ensure prompt and accurate payouts of designations.
- Process yearend tax receipts.
- Provide administrative support to department.

ADDITIONAL RESPONSIBILITIES:

- Participates in company and community functions to actively promote United Way as deemed necessary.
- Other duties as assigned.

QUALIFICATIONS AND EXPERIENCE:

- Associates degree.
- Three years' experience in accounts receivable or bank telling work environment.
- Non-profit and/or sales/customer service experience preferred.
- Experience with Andar or fundraising software preferred.
- Or, a comparable combination of education and experience.

KNOWLEDGE / SKILLS / ABILITIES:

- Demonstrated ability to manage time effectively.
- Strong interpersonal skills.
- Demonstrated financial aptitude.
- Demonstrated ability to prepare reports, present data in an understandable form, working knowledge of spreadsheet and word processing (Microsoft Excel and Word).
- Ability to learn and become proficient in use of relevant software.
- Ability to handle multiple projects in a fast paced environment.
- Demonstrated ability to communicate both orally and in writing with a wide range of customers.
- Ability to have some flexibility in schedule outside of standard office hours.
- Ability to work without supervision and to make appropriate decisions.
- Must work well in a team.
- Must be able to manage confidential and sensitive information from customers.

We're an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran or disability status.