

POSITION DESCRIPTION

Position Title: Pledge Processing Specialist

Reports to: Senior Database / Pledge Processing Manager

Wage: \$19.23 to \$24.04 per hour DOE

Position Status: Full Time, Non-Exempt

Location: Lee County, FL

Application Deadline: February 15, 2024, 5:00 PM

Submit Cover Letter and Resumé: Lisette@unitedwaylee.org

ABOUT UNITED WAY OF LEE, HENDRY, AND GLADES

United Way of Lee, Hendry, and Glades (UWLHG) is a volunteer driven organization dedicated to improving the quality of life for all people in our community. This is accomplished through fundraising, fund distribution (90+ partners), community building, volunteer advancement, and information and referral. UWLHG is a \$20 million nonprofit social services organization, with 75+ employees in four locations with the main campus being located at 7273 Concourse Drive, Fort Myers, FL. Most of the funding is from private donations although UWLHG also receives local, state, and federal grants.

Core Competencies for all United Way Professionals:

- **Mission-Focused:** The United Way Professional's top priority is to improve the quality of life for all people in our community. This competency drives their performance and professional motivations.
- **Relationship-Oriented:** The United Way Professional understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** The United Way Professional understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** The United Way Professional is dedicated to shared and measurable goals including creating, resourcing, scaling, and leveraging strategies and innovations for the best impact.
- **Brand Steward:** The United Way Professional is a steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

Overview of Responsibilities

The Pledge Processing Specialist's primary responsibilities are to ensure consistent, accurate data in the Andar donor database and supporting Andar users.

- Work with the Campaign Department and Accounting Team to ensure proper envelope identification and years to enter campaign pledges into ANDAR.
- Processing of stock donations, credit card donations, check donations, and cash donations.
- Work with third party processors and the Campaign Department to ensure correct data assignment of pledges and payments.

- Coordinate closely with the Accounting Team to ensure that all pledges and related payments are properly classified and entered into ANDAR in accordance with applicable accounting standards. Provide ANDAR reports as requested by the Accounting Team.
- Assist the Accounting Team in maintaining ANDAR as a reliable subsidiary ledger for Pledges Receivable which should at all times be in agreement with the general ledger of the main accounting system (MIP/Abila).
- Provide designation payout information to finance in accordance with UWLHG policies. Run quarterly designation payouts and supplemental payouts as needed.
- Cross train with manager on all processing procedures to ensure coverage at all times.

Required Skills

- Bachelor's Degree from an accredited college or university required. In lieu of a degree, a minimum of five years' relevant job experience will be accepted.
- ANDAR CRM database experience preferred.
- Strong technology skills that relate to database management.
- Proficient in working with all software related to donor databases.
- Possess excellent analytical, administrative, and problem-solving skills.
- Exceptional organizational skills, attention to detail, and ability to multitask.
- Must possess the ability to assume non-routine tasks and to take initiative where appropriate.
- Self-motivated with outstanding interpersonal communication skills and the ability to work with a team or independently and handle difficult situations in a diplomatic fashion.
- Collaboration between departments is essential.
- Able to interact with volunteers, donors, and representatives from the community that run United Way campaigns.
- Ability to handle confidential and sensitive information with discretion.
- Ensures compliance with governance requirements and applicable regulatory laws, rules for financial and tax reporting, and UWW membership compliance and reporting – unafraid to take action where non-compliance is identified.

Direct Reports – None

Physical Requirements & Working Conditions

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit, talk and/or hear. The employee is frequently required to use finger and hand motion and occasionally to stand, walk, and reach with hands and arms. The employee must frequently lift and/or move up to 30 pounds and occasionally lift and/or move up to 40 pounds. There may be additional physical requirements associated with volunteer events. Specific vision abilities required by this job include close vision, distance vision, depth perception and ability to adjust focus.

Requires talking, hearing, and visual acuity sufficient to perform these major functions. Occasionally, the work of this position is spent at offsite meetings, or event locations within Lee, Hendry, or Glades County.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job operates in a professional office environment, off-site venues, and outside event areas in various weather conditions. This role routinely uses standard office equipment such as computers, phones, and photocopiers.

This is a Full-Time position. Days and hours of work are Monday through Friday 8 a.m.-5 p.m. Evening and weekend events may be required occasionally for golf tournaments, auctions, and other fundraising events.

United Way is an equal employment opportunity employer and does not discriminate against any person because of race, color, creed, religion, sex, national origin, disability, age, genetic information, or any other characteristic protected by law. This nondiscrimination policy extends to all terms, conditions, and privileges of employment as well as the use of all company facilities, participation in all company-sponsored activities, and all employment actions. United Way will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in undue hardship.

Terms of employment are subject to satisfactory negative drug testing as part of our drug-free workplace program. Background testing will be conducted because of the nature of the position. Applicants may be asked to take an online skills assessment.

Additional Information:

- UWLHG is an exceptional workplace that can provide you with:
- Opportunity to work with smart, passionate, and enthusiastic team members and volunteers
- Working with diverse staff and other constituents
- Culture of high-performance expectations and accountability
- Exciting and challenging work
- Opportunity to help solve the community's toughest problems
- Competitive pay that is commensurate with demonstrated successful performance and experience
- Paid Health and Dental Insurance for employee, 401k, and Monthly Accrued PTO