

**UNITED WAY OF THE MIDLANDS  
POSITION DESCRIPTION**

Date established:

Last Revised: 6/27/2023

**Position Title: Donor Services Associate**

**Department: Accounting/Finance**

**Supervisor: Donor Services Manager**

**Position Status: Regular, Full-Time, Subject to an Annual Review**

**Job Classification: Non-Exempt**

In compliance with the Fair Labor Standards Act, this position is classified as a Non-Exempt position and the employee is eligible for overtime. Some evening and weekend hours may be required.

**POSITION SUMMARY**

The Donor Services Associate is responsible for the accurate and timely recording and depositing of campaign envelopes and receivables. Additional primary duties also include communicating with donors, agencies, and company representatives regarding pledges and payments. In addition, this position will assist the accounting team and perform other accounting duties as needed.

**ESSENTIAL DUTIES & RESPONSIBILITIES**

- Receives all checks/cash delivered by mail or staff. Keeps accurate account of all money.
- Prepares daily bank deposits.
- Enters daily accounts receivable payments and campaign receipts in StratusLive Database (donor management software)
- Audits campaign envelopes for pledge and payments
- Logs grant receipts and communicates with grant managers.
- Collaborates on the training of temporary staff for campaign envelope processing.
- Communicates with contributors, agencies, and company representatives, both verbally and in writing, regarding pledges, and payments.
- Responsible for helping to maintain data quality of StratusLive.
- Works with Donor Services Manager to analyze donor accounts for collections and issues and helps to resolve with appropriate action.
- Sets up recurring credit card subscriptions and follows up on declined credit card transactions to resolve.
- Serves as a point of contact in the finance department for Resource Development staff and workplace Employee Campaign Directors.

- Prepares and mails monthly pledge (Direct and Payroll) reminders.
- Imports payment transactions including credit cards and campaign payments into StratusLive Database
- Responds to Agency Portal emails
- Other duties as assigned.

**REQUIRED & PREFERRED QUALIFICATIONS**

**Required**

- Excellent organizational, interpersonal, communication (oral and written) skills
- Associate degree
- Proficiency in Microsoft Office family of products including Excel, Word and Outlook

**Preferred**

- Bachelor’s degree in Business or Accounting and related experience.
- 2-5 years professional business experience
- Prior non-profit work experience.
- Familiarity with StratusLive or other donor management software and Microsoft CRM
- Experience in database management and analysis.

**ACKNOWLEDGEMENT**

I have received a copy of my position description. I have read the position description, and I understand its contents.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date