Job Description

Title: Financial Development Assistant – Data Entry
Department: Financial Development
Exempt Status: Non-Exempt
Pay Status: Salaried
Immediate Supervisor: Donor Relations Coordinator
Immediate Subordinates: None
Primary Location of Work: Cobb Center at Dunn Cottage
Typical Workweek: 40 hours – Monday through Friday
Approval Authority: Administrator
Reviewing Authority: Policy & Personnel Committee of the Board of Directors

Overall Purpose of the Job:
The overall purpose of this job is to provide data entry for the Financial Development Department. This position’s duties include the processing of donor gifts and written “thank you” correspondence, donor database management, in-kind gift acknowledgement, and limited interaction with donors.

Major Functions for which the Employee has Direct Responsibility:

1. Functions as the Date Entry - Financial Development Assistant for the Agency 90% of time
   A. Operative Duties
      1) Coordinates and communicates with the CFO and the Donor Relations Coordinator on a regular basis regarding matters of financial development and donor database management.
      2) Processes and monitors all gifts entered in the donor software database, generating appropriate and effective acknowledgement letters, ensuring their accurate and timely distribution and adhering to all rules of confidentiality. Works with Finance Department to ensure accurate posting and balancing of donation revenue.
      3) Helps maintain comprehensive database that includes accurate constituent information (contact and biographical) and perform ongoing maintenance to ensure database health.
      4) Helps generate new acknowledgements, creative and effective, in recognizing donations that are appropriate and per MHCO policies.
      5) Ensure accurate and timely processing of all donations and sponsorships related to on-line giving, corporate giving, and for designated gifts related to MHCO funds and functions, including annual giving, designated giving, capital campaigns, and donor specific fundraising activities.
      6) Acknowledges in-kind gifts, including gift card donations, with entries in the donor software.
      7) Maintains online giving portal, to include receiving emails of online gifts for gift entry in the donor software.
8) Processes all paperwork to ensure matching gifts are received from matching organizations.

9) Assists in filing donor acknowledgements and in sorting and prioritizing donor acknowledgement letters.

10) Provides general administrative support. Prepares drafts and composes correspondence, endowment agreements, acknowledgements and notifications and sensitive materials. Prepares reports and gift processing paperwork. Screens and prioritizes mail, directs mail to other staff members or independently provides appropriate response.

11) Provides telephone exchange duties and directs calls to appropriate parties. Responds to callers, fielding questions regarding donations.

12) Maintains all mailing lists, to include but not limited to, calendar mailing list and annual report mailing list.

13) Provides financial development reports as requested by the Donor Relations Coordinator and the CFO.

14) Assists the CFO and Donor Relations Coordinator and other Agency Board members or personnel involved in overall fundraising and marketing efforts.

2. **Functions as Receptionist and Scheduler for the Cobb Center at Dunn Cottage**  
   **10% of time**

   A. Operative Duties

   1) Serves as back-up contact during Cobb Center business hours regarding scheduling and meeting reservations for center use.

   2) Serve as back-up on-site receptionist for center during normal business hours.
**Person Specification**

Position: Financial Development Assistant – Data Entry

**Prerequisite Qualification, Education, Experience, or Certification:**

The person occupying this position must possess an Associate Degree and two to three years experience in the areas outlined as job responsibilities or a Bachelors Degree and one year of experience in the areas outlined as job responsibilities. Essential experience with Microsoft Word, Excel, Outlook and other Microsoft applications.

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<thead>
<tr>
<th>Major Function or Responsibility</th>
<th>Required Qualification, Education, or Certification</th>
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<tbody>
<tr>
<td>Function as the administrative assistant to the Financial Development Department</td>
<td>Associate’s/Bachelor’s Degree, familiar in database management, donor software, filing, recordkeeping, reporting, and scheduling.</td>
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<tr>
<td>Function as the back-up receptionist and scheduler for the Cobb Center</td>
<td>Working knowledge of the Home’s policies and procedures.</td>
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<tr>
<td>Function as the primary database manager for the donor database</td>
<td>Ability to work with the general public, potential constituents, staff, and residents for the purpose of generating support and providing information.</td>
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Employee’s Signature | Date | Supervisor’s Signature | Date