

Job Description

Donor Services Coordinator

United Way of Johnson & Washington Counties

Reports to: Vice President of Finance and Operations

Full Time



POSITION SUMMARY:

Working under the general supervision of the Vice President of Finance & Operations, and in collaboration with the Director of Development & Marketing, the Donor Services Coordinator will carry out the work necessary to accomplish the mission of the United Way of Johnson & Washington Counties (UWJWC) related to database management, pledge and revenue processing, annual campaign support, and donor communications and stewardship.

The person in this position will be an integral part of a small team. As such, they must be flexible and willing to support other staff members when needed. The characteristics of the person in this position are highly organized, detail-oriented, dependable, trustworthy, able to prioritize and juggle tasks to meet deadlines, and able to work well both independently and as a team. Strong written and verbal communication, critical thinking and problem-solving, and excellent customer and donor service skills are required. Commitment to accuracy and high-quality work is a must. Ideas for innovation and efficient practices are welcomed.

Many of the duties associated with the Donor Services Coordinator are computer-oriented, therefore, a strong working knowledge of Microsoft Office software, database management, as well as the ability to learn new systems easily is required.

SALARY: \$46,000

DESIRED OUTCOMES:

- Ensure integrity, accuracy, and strategic usability of donor database
- Establish and maintain timely communications with donors and workplaces running United Way campaigns concerning pledge processing, fulfillment, and acknowledgement
- Ensure timely and accurate reporting on campaign progress.
- Ensure accurate reporting and processing of donations designated to other non-profits or United Ways.

ESSENTIAL DUTIES AND RESPONSIBILITIES: (Other duties may be assigned.)

Donor Database & Pledge Processing

- Serve as the primary steward of CRM database (Andar 360), ensuring the accuracy, integrity, and consistency of all donor and campaign data. Develop and grow CRM capabilities, train staff on uniform data entry and CRM use.
- Manage daily database operations, including entry, imports/exports, audits, and system maintenance.
- Produce and analyze fundraising reports, tracking pledges, payments, donor retention, and revenue trends.
- Reconcile donor data with finance team, resolving discrepancies in pledges, gifts, and check logs.
- Maintain campaign tracking tools, donor lists, demographics, and reporting dashboards to support donor & volunteer stewardship.
- Record designations to UWJWC initiatives and programs, other nonprofit agencies, and other United Ways.
- Send required reporting of designations to outside nonprofits and other United Ways. Prepare, run, and distribute donor designation payouts to partner agencies, other United Ways, and nonprofits. Work with other United Ways and third-party processors to receive and process donations and pledges not made directly to UWJWC.
- Create and update reports, data-mining operations, and mailing lists from CRM as needed and on request by staff team for analysis, mailings, and attendance and campaign tracking.

Donor Services & Campaign Support

In close collaboration with the Director of Development & Marketing, this role is responsible for the following tasks:

- Prepare and send campaign invoices and billings, thank you letters, and tax receipts.
- Assist with outreach and development communications including donor recognition, lapsed and step-up donor campaigns, and segmented donor outreach efforts.
- Handle donor inquiries and requests via mail, email, and phone as needed.
- Work with corporate and agency contacts to set up and process workplace campaigns. Serve as direct contact for campaigns utilizing the United Way online ePledge system.
- Maintain documentation of pledges for audit, campaign reporting, and financial reconciliations. Oversee renewal of recurring donations.
- Monitor outstanding pledge balances, follow up with donors, process write-offs and adjustments.
- Manage volunteers assisting with pledge processing, database cleanup, and donor communications.

Finance, Compliance, & Administration

In close collaboration with the Vice President of Finance & Operations, handle the following tasks:

- Enter all incoming revenue into CRM. Monitor bank accounts, online payment and fundraising vendors, and 3rd party processors for incoming ACH transactions. Save documentation for audit and financial recordkeeping. Coordinate with finance team to match CRM entries with accounting software.
- Assist with month-end closeout by preparing transaction reports and performing pledge receivable reconciliation with accounting software.
- Compile the annual Database 2 report for United Way Worldwide, with input from all staff.
- Contribute to monthly and annual reporting for review by UWJWC staff, Board of Directors, and public.
- Assist with annual budget process – create campaign breakout and donor/giving trend reports
- Assist with annual audit and 990 – provide reports, prepare confirmation letters, retrieve donor information, and assist auditors as necessary.
- Provide support to staff as needed.
- Ensure compliance with United Way Worldwide standards and requirements.

QUALIFICATIONS:

- Bachelor's Degree or equivalent with at least 3 years of progressive experience in a similar role.
- Strong hands-on experience with a CRM system required; experience with nonprofit CRMs preferred.
- Demonstrated ability to manage and maintain data accuracy at a high level of detail.
- Advanced proficiency in Microsoft Office, particularly Excel (data analysis, reporting, imports/exports).
- Excellent written and verbal communication skills; ability to interact professionally with donors, volunteers, board members, and community partners.
- High level of discretion, confidentiality, and sound judgment.
- Strong critical thinking, administrative, and organizational skills with the ability to manage multiple priorities and independently problem solve.
- Ability to work both independently and collaboratively in a team environment.
- Valid driver's license and appropriate vehicular insurance, or proof of reliable transportation.
- Ability to work on site at United Way, located less than two miles from campus and on the bus route
- Familiarity with United Way, the Johnson & Washington County service area, and nonprofit employment preferred.
- Subject to a three-part criminal history background check, including fingerprinting and National Sex Offender Public Registry Check.

HOURS:

This position is full-time, Monday to Friday, 8:30 am to 4:30 pm, in person at our Iowa City office. Participation in early morning, evening, or weekend events and meetings will be required occasionally as needed.

PHYSICAL DEMANDS:

The physical demands of this job are representative of those required to successfully perform the essential duties of the job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Benefits:

- 95% of employee health and dental or 75% of family coverage.
- 100% of Long-Term Disability, Life, and Accidental Death or Dismemberment insurance.
- Voluntary benefit plans including Healthcare Flex Spending and Aflac Cancer and Accident insurance.
- 34 days annual PTO, accrued monthly, and 12 paid holidays.
- 401k after 1 year of employment with a 7% employer contribution and optional employee contributions.

United Way of Johnson & Washington Counties is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability status, protected veteran status, or any other characteristic protected by law.