



United Way  
of Greater Rochester  
and the Finger Lakes

## UNITED WAY OF GREATER ROCHESTER AND THE FINGER LAKES CAREER OPPORTUNITY

### DONOR CHOICE & DATA ENTRY ASSOCIATE

#### Summary

This position serves as the primary contact for the donor choice functions at United Way of Greater Rochester and the Finger Lakes.

#### Essential Functions

##### Donor Choice:

- Serves as the primary finance donor choice contact for donor agencies and staff inquiries concerning donor designations
- Responsible for vetting all agencies using GuideStar to ensure eligibility and compliance with United Way standards.
- Responsible for all administrative donor choice functions including mailings, donor contacts, agency follow-ups, donor designation confirmation process and donor's special designation questions
- Responsible for ensuring that United Way local campaign's donor designation brochure, the state campaign brochure, and ROC the Day campaign agencies are accurate and complete.
- Assigns and maintains agency donor choice structure, ensures all agencies are appropriately included in the database, and includes data entry of agency, name, address, etc. and coordination of EFT information for agencies in an internal database
- Assists users of United Way's online agency portal to retrieve agency information and input/update usernames/ for agencies
- Responsible for donor choice reports at the conclusion of campaigns and understanding the relationship between campaign and designation reports as well as how data appears in Salesforce
- Serves as the point person for biennial agency vetting/certification for all agencies participating in United Way campaigns. Coordinates all aspects of the vetting including: recording agency certification submissions, reviewing paperwork, banking information, coordinating agencies' database records, and maintaining the GuideStar watchlist.
- Serves as the coordinator for reviewing, accepting, and recommending denials of agency applications according to current standards. Agency recommendations will be made to the Chief Financial Officer and the Chief Impact Officer.

## **Data Entry**

- Responsible for ensuring pledge card donor data is accurately captured in ANDAR (B-1, B-2) during the Spring and Fall campaigns, including any editing and correcting of donor choice designations. Including using judgement to ensure the correct donor account is updated, billing schedules are accurately captured and the donor has completed all necessary information.
- Responsible for updating/adjusting donor pledge and designation information as needed after the original pledge has been entered
- Backup to preparing memorial letters
- Update United Way agency information (entry of name, address with other pertinent information on ANDAR)
- Understand and apply the United Way's databases standards when capturing/updating donor and financial data. Includes assigning account structure and backup for merging accounts, dead filing and deleting accounts.
- Performs data quality clean-up as necessary in accordance with UWGR's data standards to ensure accurate mailings and storing of data and maintains ANDAR integrity. Runs daily/weekly reports and adjusts data that does not conform to our standards.
- Confirms data used in mailings and recognition to leadership giving society members.

## **Purchasing**

- Purchase office and other supplies for the organization
- Research pricing, enter requisitions and purchase orders daily and reconcile orders as required; maintain purchase order files; mail purchase orders as needed
- Close purchase orders when product is received and file by vendor
- Make travel arrangements for all employees traveling on business. Work with the employee to satisfy timing needs and ensure United Way's costs are kept within the budget
- Consistently demonstrates the values and mission of United Way
- Performs other duties as assigned

## **Competencies**

- Attention to Detail
- Collaborative/Team Player
- Communication Proficiency
- Customer/Client Focused
- Flexibility
- Analytical Ability/Problem-Solver
- Sensitivity to issues of confidentiality

**FLSA CLASSIFICATION:** Non-Exempt

**REPORTS TO:** Business Operations Controller

**United Way of Greater Rochester and the Finger Lakes**

75 College Avenue • Rochester, NY 14607-1009 P. 585 242-6400 W. [UnitedWayROCFLX.org](http://UnitedWayROCFLX.org)

## **SUPERVISORY RESPONSIBILITY**

None

## **TRAVEL**

There is no regular travel

## **EDUCATION AND EXPERIENCE**

Associates degree with 2 years of related experience or equivalent combination of education and experience. Must have experience in Word and Excel.

## **JOIN THE TEAM!**

United Way of Greater Rochester and the Finger Lakes is a dynamic and collaborative work environment comprised of dedicated professionals driven to make our community a better place. Join our team and make an impact serving our region with your time and talent.

## **OUR MISSION**

Our mission is to unite the goodwill and resources of our community so that everyone can thrive. That means that our team is committed to working with local donors, businesses, not-for-profit program partners, municipalities, and individuals to make this region more robust and vibrant together.

## **OUR VALUES**

Our core values define who we are and how we serve our community together. United Way and our team members are caring, trustworthy, collaborative, innovative, respectful, equity-driven and results-oriented. United Way strives to ensure employees and external partners feel valued, connected, and empowered.

## **WHAT WE OFFER**

- Competitive financial and wellness benefits
- Generous paid time off, retirement plan, and other fringe benefits
- Hybrid working arrangements
- Opportunities to give back to the community in life-changing ways
- Paid professional development
- Team events and internal committees for connection opportunities and fun!

## **HOW TO APPLY**

Candidates may apply online at: <https://unitedwayroclx.org/about-us/join-our-team/>.

This job description lists only the responsibilities and qualifications deemed essential to the position in support of the ADA. Reasonable accommodations may be provided to enable individuals with disabilities to perform the essential functions. United Way of Greater Rochester and the Finger Lakes is an Equal Opportunity Employer. This policy prohibits discrimination based on sex, race, color, religion, creed, national origin, age, marital status, sexual orientation, gender expression, disability, genetic predisposition, veteran status, or status as a member of any other protected group or activity.

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