



United Way
of Greater Rochester
and the Finger Lakes

UNITED WAY OF GREATER ROCHESTER AND THE FINGER LAKES CAREER OPPORTUNITY

MANAGER OF PLEDGE SERVICES

JOIN THE TEAM!

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

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 stronger and more vibrant together.

VALUES

Our core values define who we are and how we serve our community. United Way and our team members are caring, collaborative, equity-driven, innovative, respectful, results-oriented and trustworthy.

JOB TITLE: **Manager of Pledge Services**

FLSA CLASSIFICATION: Exempt

REPORTS TO: Finance and Budget Director

SUMMARY

The Manager of Pledge Services is an integral part of the finance team and serves to ensure donors' gifts are properly accounting for, collected, and paid out to United Way's non-profit partner organizations to help our community thrive. The Manager of Pledge Services is responsible for the operations of the following finance functional areas: pledge processing, pledges receivables, financial/billing data integrity, and designation/agency finance relations including ongoing continuous improvement in all areas. This position also has oversight of employees in the finance department.

ESSENTIAL FUNCTIONS

- Responsible for the pledges receivable process including processing of monthly statements, monthly reconciliation, collection efforts, tax receipts, oversight of deposits, pledge adjustments, special billing and back up for stock donation processing
- Oversees employees in the finance department that are responsible for pledge processing
- Oversees the process of data integrity in the pledge processing database. Develops procedures and systems for use in ensuring financial control and provides data and reporting for departmental and management information needs.
- Directs the designation agency application and re-certification process and ensures that agencies are eligible for payouts. Prepares related internal management reports for designations.

- Oversees all aspects of the web-based agency portal for agency use in accessing and generating reports
- Responsible for electronic pledge processing functions including data processing, reconciliation, reporting and ensuring integrity of policies and procedures are in accordance with regulatory standards
- Responsible for processing pledges receivable including national corporate entities and working with the associated other United Way organizations
- Understands United Way Worldwide Standards as they apply to pledge and designation processing and payouts
- Develops and implements best practice strategies and procedures to ensure efficient and lean financial operating/ technology standards
- Serves as a team member for technology integration efforts
- Consistently demonstrates the values and mission of United Way
- Performs other duties as assigned

SKILLS AND COMPETENCIES

- Business acumen
- Communication proficiency
- Ethical/Credible
- Financial Management
- Leadership
- Strategic Thinker
- Technical Capacity

SUPERVISORY RESPONSIBILITY

This position has supervisory responsibility

TRAVEL

Travel is primarily local during the business day, although some out of the area and overnight travel may be expected.

EDUCATION AND EXPERIENCE

Bachelor's degree in related field from an accredited program with a minimum of 3 years of accounting and/or database experience; or equivalent combination of education and experience. Management experience and 5 years accounting and/or database experience is preferred.

HOW TO APPLY

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

In support of the ADA, this job description lists only the responsibilities and qualifications deemed essential to the position. Reasonable accommodations may be made 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 on the basis of 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.

United Way of Greater Rochester and the Finger Lakes

75 College Avenue • Rochester, NY 14607-1009 P. 585 242-6400 W. UnitedWayROCFLX.org