

Charleston Animal Society (CAS)

JOB DESCRIPTION

<u>Dept./Division:</u>	Administration
<u>Title:</u>	Gift Processing and Records Coordinator
<u>Supervisor/Title:</u>	Chief Financial Officer
<u>Direct Reports:</u>	No direct reports
<u>Working Relationships</u>	Constituents, Officers and Committees of the Board of Directors and Senior Staff
<u>Compensation:</u>	Exempt; Full-time, commensurate with experience and qualifications.
<u>Job Summary:</u>	Under minimal supervision, serves as the frontline for contact with donors constituencies related to gifts, process gift and pledge adjustments and is responsible for performing a variety of complex duties associated with confidential gift processing function. Receives gifts in the form of checks, charge cards, stock transfers or other valuables, and develops and maintains procedures manual for gift and pledge entry and maintenance. Ensures compliance with accounting principles, Charleston Animal Society policy, state, and federal laws.
<u>Key Responsibilities:</u>	<ul style="list-style-type: none"> • Provides customer service to donor constituencies, regarding donor designation, allocation, receipts, and recognition. Counsels department leadership, donors, gift officers, and others on IRS compliance and regulations, processes and procedures on charitable donations. • Processes large volume of gifts in the form of cash, checks, charge cards, stock transfers, IRA transfers, royalty payments or other valuables. • Identifies processing problems or deficiencies, takes corrective action and makes recommendations for changes. Researches and resolves problems related to transactions and other activities. • Analyzes gifts and documentation to determine legal donor, gift category, IRS charitable types and funds for application and charitable gift eligibility. Works with development officers to coordinate appropriate pledge applications/designation. • Verify and ensure acquisition of matching gifts. Research donor employment for matching gift eligibility; process on-line matching gift verifications from matching gift companies; notify donor or development officer of matching gift opportunity; update and maintain matching gift information in system; process information to follow up on matching gift forms not received from donors and payments not received from matching gift companies to maximize donations. Make appropriate updates in system to employment and matching gift status. • Administers gift acknowledgement process for donors. Coordinates with development officers and board on gifts from key donors, pledges or fund, a foundation or a matching gift company. • Create new and maintain existing biographical records and information including addresses, business and employer information, matching gift company information, name changes and other facts pertinent to our constituents. Review gift document and multiple additional sources including the BBNC connector, staff updates, etc. • Maintains specific modules of the donor database; manages appropriate department records in accordance with applicable policies and standards; creates regular and ad-hoc reports as requested and assists management in interpretation of reports. <p>Compliance</p> <ul style="list-style-type: none"> • Follow processes and procedures for compliance with National Automated Clearing House Association (NACHA), Payment Card Industry (PCI), Identity Theft procedures and Charleston Animal Society policies. • Ensure compliance with legal and professional standards, including IRS substantiation and disclosure regulations, CASE management and reporting stands, FASB accounting standards, matching gift program policies and giving societies and other professional and institutional standards and practices. • Assist with data integrity and enhancement processes. Assists in conducting internal audits of data entry, gift processing, and gift classifications. • Assists senior level staff with researching current legislation and compliance regulations on a wide variety of compliance practices as appropriate. Participates in the review of revisions to

	<p>existing policies and procedures. Suggests refinements to policy and procedures to ensure compliance and efficiency.</p> <ul style="list-style-type: none"> • Participate in testing of enhancements to The Raiser’s Edge module. <p>Other Duties</p> <ul style="list-style-type: none"> • Complete special projects as assigned by the Chief Financial Officer, the Director of Philanthropy, and the Chief Executive Officer. • Prepare and distribute regular and adhoc reports for development officers and executive leadership on donor gifts. • Perform other related duties as assigned.
<u>Qualifications:</u>	<ul style="list-style-type: none"> • Strong interpersonal and communication skills and the ability to work effectively with a wide range of constituencies in a diverse community. • Skill in the use of personal computers and related software applications. • Records maintenance skills. • Ability to interpret, analyze, and advise on the application of compliance laws and regulations. • Ability to write reports containing technical information. • Knowledge of The Raiser’s Edge and computing/database skills • Knowledge of IRS charitable donation and acceptance regulations. • Knowledge of accounting principles. • Familiarity of fund-raising principles and campaign standards. • Understanding of principles of relational database and devising procedures for maintaining records. • Strong problem identification and solution skills, as well as strong organizational skills • Ability to analyze and interpret data to non-technical colleagues. • Ability to handle complex and multiple tasks. • Ability to work effectively under stress and adhere to tight deadlines. • Maintain confidentiality in the handling and dissemination of highly confidential information. • Associates degree or 4-year college degree highly preferred. • 3-5 years of experience in accounting, data entry, or advancement services required • Experience with a relational database (CRM) required, The Raiser’s Edge preferred.
<u>Additional Information</u>	<ul style="list-style-type: none"> • Valid driver’s license required and must have excellent driving record. • Occasional travel throughout Charleston County, the State and Nation. • Must be self-guided individual requiring minimal supervision. • Physical requirements include, but are not limited to, walking, standing and moving of equipment and animals (ability to lift 50 pounds).
<u>Schedule:</u>	Primary schedule may include weekdays and/or weekends, including evenings, as appropriate.
<u>Working Area:</u>	Charleston Animal Society and venues for meetings throughout Charleston County and beyond.

Job Description Approved by:

Position Authorized by:

Employee Review & Acceptance:

Date: _____

Date: _____

Date: _____