



SUMMARY

United Way of Greater Milwaukee & Waukesha County (UWGMWC) has a great opportunity for an analytical and detail-oriented **Pledge Processing Assistant**, working in our Transaction Processing department to provide exceptional customer service to donors, agencies and internal staff. Support the day-to-day operation of the Pledge Processing team, including gift entry, quality control checks, mailing and filing. Assist in training and supporting Seasonal Pledge Processing Staff during Fall Fundraising Campaign. Support processes ensuring accuracy for donors with special focus on those that give \$10,000+ annually.

KEY JOB FUNCTIONS

DONOR & AGENCY CUSTOMER SERVICE

- Respond in a timely manner to phone and email inquiries from donors, including questions about designations, tax receipting, gift distribution, fee structure, payments and refunds. Coordinate with Finance and other internal departments to answer donor questions.
- Assist in supporting the online Agency Reporting Portal and answering agency inquiries: setting up user access; answering questions about report information, donor information and fund distribution; creating how-to documentation.
- Administer outreach to donors designating to ineligible designations, including phone, letter and email follow up.
- Maintain up-to-date database of Agency Reporting Portal contacts: creating and sending mass communications soliciting contact information, create and audit database records.
- Track donor and agency inquiries in database for analysis and process improvement.
- Answer questions from internal staff regarding accounts and donors.
- Communicate issues, updates and resolutions to key internal stakeholders. Escalate major issues to Transaction Processing Manager.

PLEDGE PROCESSING DEPARTMENT SUPPORT

- Support daily entry of donor gifts received through the mail: open and sort mail, enter corporate and individual gifts, create deposits. Maintain audit trails specific to each transaction.
- Assist in data entry of donor gifts from third party processors: download information from online portals, format data into Excel spreadsheets, resolve data issues, and maintain database notes.
- Assist in data entry of gifts that need special handling, including endowments, sponsorships and gifts-in-kind.
- Manage and administer Pledge Processing departmental filing system.
- Assist in reviewing data quality control reports on a timely basis.
- Coordinate Pledge Processing mailings and mass emails.
- Assist in creating training materials and printouts for training internal staff.
- Assist with annual quality check of donor pledge forms and online giving system information.
- Assist in retrieving and preparing data for annual financial audits.
- Provide back-up for UWGMWC front desk.

SEASONAL PLEDGE PROCESSING SUPPORT

- Support Seasonal Pledge Processing Staff hired during Fall Campaign season to perform paper pledge entry. Answer staff questions and re-train as appropriate, research issues, provide back up for task completion as needed.

- Assist in creating and administering Seasonal Staff training on pledge processing topics including audit, input, edit, deposit and adjustments.
- Assist in creating and maintaining policies and procedures for Seasonal Staff.
- Act as a liaison with Resource Development department to resolve gift questions.
- Communicate progress and resolution with key stakeholders. Escalate major issues to Transaction Processing Manager.

\$10,000+ DONOR SUPPORT

- Assist in receiving and inputting gifts from donors who give \$10,000+ (deTocqueville Society or DTS donors).
- Act as a liaison with Major Gifts Officer regarding questions or issues with DTS Pledges.
- Assist in maintaining DTS donor information, including scanning and filing.
- Assist with monthly DTS Audit and other quality check reports to ensure data integrity.
- Assist with special DTS payout letters.

KEY REQUIREMENTS

EDUCATION and EXPERIENCE:

- Minimum high school diploma or GED.
- Two or more years' experience in finance or administrative support.
- Two or more years' experience in customer service.
- High competency in Microsoft Excel, Word, and Outlook.
- Experience working with a Customer Relationship Management (CRM) database.
- Excellent written, phone and face-to-face skills.
- Demonstrated attention to detail.

OTHER SKILLS:

- **Customer Focus:** Ability to work in a complex environment using interpersonal skills. Builds effective relationships with customers, identifies customer expectations, tries to see issues from their point of view; offers practical solutions to problems. Ability to problem-solve customer issues and work with flexibility.
- **Approachability:** listens; allows adequate time for interactions; creates a supportive communication environment.
- **Process Management:** Uses the necessary steps to successful execution/completion of tasks within the work environment, and demonstrates necessary discipline in adhering to existing processes; uses creativity/innovation in analyzing needed changes/improvements to existing processes. Ability to use technical skills to work independently, organize tasks, implement, and follow through to completion.
- **Investigation:** Conducts thorough gathering of factual information as a basis for decision making. Demonstrated ability to anticipate problems and identify and implement solutions when needed.
- **Ethics & Integrity:** Makes decisions and conducts self-consistent with organizational principles.

TO APPLY:

For further job criteria and complete details, click on: <https://www.milwaukeejobs.com/j/26198751>. **If you meet or exceed job requirements, please apply directly at this web address today.** Please indicate salary requirements.

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