



Gifts Processor and Administrative Assistant

POSITION DESCRIPTION

The Winston-Salem Foundation (WSF) is currently seeking a Gifts Processor and Administrative Assistant who will be responsible for processing gifts and donor acknowledgements, as well as providing administrative support for the Philanthropic Services department. He/she will report to the Director, Philanthropic Services and will work closely with other team members and collaboratively with other members of the Foundation's staff.

ABOUT THE WINSTON-SALEM FOUNDATION

WSF is a nonprofit community foundation, comprised of over 1,500 funds, that assists people and organizations with their charitable giving, provides financial aid to college students, and provides Community Grants to nonprofit organizations in Forsyth County. WSF is the oldest foundation in North Carolina, and one of the oldest community foundations in the country.

*The mission of The Winston-Salem Foundation is: **we inspire giving and link resources to action, strengthening Forsyth County- now and forever.***

*The vision of The Winston-Salem Foundation is: **a generous and trusting community where everyone is thriving.** The following values are essential to the work of The Winston-Salem Foundation:*

Inclusion: *We practice and champion inclusion, honoring the strengths and experiences of all in our community.*

Accountability: *We honor the intentions of our donors and partners and hold ourselves to the highest standards of ethics, service and stewardship.*

Continuous Learning: *We are committed to learning and evolving with our community and our partners.*

DESCRIPTION OF RESPONSIBILITIES

Gifts Processing (60%)

- Using knowledge of IRS guidelines regarding charitable contributions, internal gift processing guidelines, and the Foundation's Gift Acceptance Policy, accurately record gifts in Raiser's Edge (including checks, cash, credit cards, securities, bank drafts, real property, matching gifts, payroll deductions, bequest expectancies, and revocable and irrevocable trusts). Determine appropriate

gift designation by reviewing accompanying documentation; perform account management duties to ensure donor gifts are deposited according to donor intent.

- Facilitate gifts of stock by reviewing online discount brokerage accounts daily and interacting with the other brokerage firms as needed. Accurately research the value of stock gifts for gift entry.
- Maintain letter templates and produce official daily tax receipts/acknowledgement letters to ensure donors are promptly thanked according to Foundation standards and IRS regulations.
- Produce honor/memorial letters weekly and manage the Book of Memory.
- Work collaboratively with Finance department to ensure financial reconciliation; post gift transactions from Raiser's Edge to the Financial Edge database. Provide Finance with all necessary documentation to reconcile daily batches, including electronic daily batch reports and credit card reports.
- Enter biographical information for Raiser's Edge constituents such as employment information, marriage and family details, and community involvement; create new constituent records as needed for fundholders, donors, businesses, and foundations; update addresses, phone numbers and email addresses.
- Perform routine matching gift administration duties.
- Track outstanding pledges and generate pledge reminders.
- Process online credit card gifts and link them through the Net Community plugin to constituent records.
- Serve as Philanthropic Services' primary liaison with Finance regarding charitable funds and the movement of money.
- Create and maintain database tables/records for gift-related information.

Administrative Support (30%)

- Assist Advancement Team in the process of setting up new charitable funds by entering new fund information in Raiser's Edge and Financial Edge, scanning relevant fund documents, and preparing mailings for donors.
- Coordinate the printing, stuffing, and mailing of quarterly fund statements.
- Assist with a variety of Foundation events; track RSVPs and coordinate logistics such as invitations, food, nametags, seating assignments, and follow-up mailings.

Other (10%)

- As requested by other Foundation staff, prepare gift reports, pledge projections, campaign reports, etc.
- Maintain current documentation for position responsibilities. Train co-workers in job duties ensuring adherence to procedural guidelines.
- Provide customer service to donors via telephone and email. Communicate with donors to address questions/concerns and to clarify gift instructions.
- Represent the Foundation at occasional day and evening events.
- Other responsibilities as assigned by the Director, Philanthropic Services.

QUALIFICATIONS

- Three years of experience with data entry, preferably in gift processing or accounting data entry.
- Experience using queries to extract information from constituent records.
- Experience with Raiser's Edge or other constituent relationship management system preferred.
- Demonstrated proficiency in Microsoft Office Suite: Excel, Word, Outlook, and PowerPoint.
- Customer service oriented.
- Ability to handle multiple tasks and work in a team environment.
- Unquestionable integrity and confidentiality required.
- High level of attention to detail.
- Ability to use good judgment and make independent decisions.
- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures.

Salary range is \$34,000 - \$47,000 commensurate with experience. Benefits include paid vacation, holidays, and sick leave. Health insurance, life insurance, dental insurance, and short-term and long-term disability insurance begin the first of the month following 30 days of employment. Eligibility for the defined benefit retirement plan begins after one year of service. Other optional benefits include a flexible benefit plan, supplemental insurance available, employee supplemental retirement plan, charitable match program, and tuition and fee reimbursement.

The Winston-Salem Foundation is committed to building a staff that reflects our community and encourages applications from a diverse candidate pool.

Apply by Wednesday, April 24, 2019 at wsfoundation.org/careers.