



**Mission:** Mobilizing the power of our community to break the cycle of poverty

**Vision:** A community where all citizens achieve their potential through education, financial stability, and healthy lives

**Values:** Integrity, Accountability, Partnership, Compassion, Excellence

## **FINANCE AND DATA SUPPORT ASSISTANT**

### **ORGANIZATION**

United Way of Charlotte County is mobilizing the power of our community to break the cycle of poverty. Our workplace is fast-paced, friendly, and adaptive. People with diverse backgrounds and abilities are encouraged to apply. Join us in giving everyone in our community the opportunity to live their best life. We are seeking a Finance and Data Support Assistant – this team member is critical to success of our mission.

### **You are a good fit for this position if:**

- You are interested in a part-time position of up to 24 hours per week;
- You are detail oriented with strong analytical, problem solving and decision making skills with ability to manage and analyze large data sets;
- You have the ability to multi-task in a fast-paced environment;
- You have effective time-management and organizational skills;
- You have demonstrated the ability to prioritize independently based on team goals;
- You have excellent verbal and written communication skills;
- You have the ability to handle multiple projects and data sources;
- You are able to work collaboratively in a rapidly changing team environment;
- You are able to perform intermediate business math and accurate data entry;
- You are an independent self-starter; motivated to seek out new opportunities to review and analyze data to support strategic decision-making; comfortable with embracing change.

### **Job Responsibilities/Duties Include:**

- Provide customer support as needed, including answering and directing phone calls.
- Receives incoming pledges, cash, checks, ACH and records information from internal data systems and data downloaded from external web portals.
- Enters contribution and related information into electronic forms on behalf of donors as needed, extracts, manipulates and standardizes electronic data files to prepare for or support processing, submits requests for gift, pledge and payment adjustments, and tracks follow-through.
- Maintains and updates donor and agency accounts, company processing expectations and other constituent or contribution related information in data management systems/databases using a variety of methods.
- Works with other departments and teammates to research and resolve internal and external inquiries.
- Performs QA and takes steps to mitigate errors in gift and constituent data based on ongoing review of data integrity.
- Prepares reports and analysis related to donor gifts and related data sets for internal and external use and to support business decisions.

- Assists with database administration and maintenance including designing and implementing protocols and training staff.
- Creates reports and dashboards needed by RD staff and executive leadership team to manage their portfolios and track progress against revenue and activity goals.
- Produces regular revenue reports for RD and Finance teams, as well as senior leadership, to track funds raised against goals, illustrate significant trends and inform revenue projection adjustments.
- Designs and implement systems for tracking and reporting revenue. Includes designing processes to ensure data integrity in the master database and creating data mines and reports that are used by fundraisers and senior leaders to track progress against goals.
- Works with senior staff to reconcile projected revenue with actuals.
- Provides administrative support for United Way Foundation of Charlotte County as required.
- Compiling financial documents for month end reconciliation.
- Assist with routine office filling.
- Performs other duties as assigned.

### **Qualifications**

- Associates' degree, or equivalent, in business administration, accounting, or a related field
- Must have at least three years' experience in data processing or office administration
- You have intermediate proficiency in Microsoft Office Suite (Word, Excel and Access)
- You are familiar with financial statements
- Strong familiarity with donor databases, data mining, and reporting.
- Access to reliable transportation, proof of insurance, and a valid driver's license
- Demonstrated excellence in project management, communication and organizational skills
- Experienced with donor management software.

### **UNITED WAY CORE COMPETENCIES FOR ALL STAFF**

- **Mission-Focused:** Catalyze others' commitment to mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

### **PHYSICAL REQUIREMENTS**

The employee is regularly required to communicate clearly, in oral and written formats, with others in person, over the phone, and via other devices. The employee must be able to transcribe, read extensively, prepare and analyze data and figures, operate a computer and other standard office machinery. Attend occasional UWCC hosted events and assist as team member in execution of successful event.

Email your resume to [admin@unitedwayccfl.org](mailto:admin@unitedwayccfl.org)

or deliver to:

17831 Murdock Circle, Suite A, Port Charlotte, FL 33948

No phone inquiries.