

# Diocese of Sacramento

## JOB DESCRIPTION

<b>DEPARTMENT:</b>	<b>The Catholic Foundation</b>
<b>POSITION:</b>	<b>Donor Services Assistant</b>
<b>CATEGORY:</b>	<b>Non-Exempt – Full Time</b>

**SUPERVISOR:** Executive Director, The Catholic Foundation of the Diocese of Sacramento, Inc.

**JOB SUMMARY:** Performs data input for gifts/pledges received and creates or updates donor record information in Raiser's Edge, the Foundation's donor database. Provides back up administrative and clerical support to the Executive Director of The Catholic Foundation, and works closely with other members of the department in accomplishing the mission of the Foundation.

### ESSENTIAL FUNCTIONS:

#### I. Primary Responsibilities:

##### Gift Processing and Data Entry:

- Identifies donor designations for a specific fund (ONE, ACA and Special Collections).
- Encodes all envelopes and creates a batch for each deposit.
- Assembles batches for deposit of checks.
- Proofs batches and deposits processed by other staff.
- Sets up one-time gifts, pledges and recurring gifts in Raiser's Edge based on the information provided on the donor envelope (includes check, credit card and ACH-EFT forms of payment).

##### Donor Follow Up:

- Works under the direction and guidance of the Database Administrator and Donor Services Coordinator in following up on donations as needed.
- Sends decline letters to donors whose payments have been declined.
- Provides Data Entry update assistance in Raiser's Edge.

##### Maintains the following files:

- Batch Control Reports for Capital Campaign, Annual Catholic Appeal, Catholic Herald and Special Collections.
- Credit Card batch records, donation envelopes, and correspondence.
- Pledge, recurring gift and one-time gift envelopes/documentation (cash and check).

#### II. Secondary Responsibilities:

##### Telephone Contact:

- Provide back up department telephone support as it relates to donors, volunteers, parishes, and diocesan and national appeal offices, directing calls, when necessary, to other staff.
- Contacts parishes/donors as necessary for updated information.

- Contacts donors regarding any discrepancies on payments received.

**Manages Department Mail:**

- Assists in picking up, date stamping and distributing department mail received for that day as instructed by department Administrative Assistant.

**Prepares Special and Periodic Outgoing Mailings:**

- Assembles statements, letters, and other correspondence for mailing either alone or with other staff.
- Process outgoing mail from Foundation staff as necessary to Foundation donors, volunteers, vendors, etc. by USPS, UPS, or FedEx, as appropriate.
- Assists the Administrative Assistant in assembling quarterly progress mailings as needed.

**III. Other:**

- Maintains strict confidentiality at all times.
- Performs other duties as assigned.
- Bilingual (English and Spanish).

**PHYSICAL REQUIREMENTS:**

- Able to sit for extended periods of time.
- Able to perform repetitive data entry.
- Able to lift and carry up to 15 pounds.

**MINIMUM QUALIFICATIONS:**

**Education:** High school diploma; some business related college courses helpful.

**Experience:** Two to four years of broad, varied, and increasingly responsible clerical and administrative experience.

**Skills/Knowledge:** Proficient and accurate in working with numbers; detail oriented; proficiency in computerized word processing (Word); working knowledge of spreadsheet software program (Excel); typing 60 WPM or better; excellent phone skills, working knowledge of modern office practices and equipment; ability to maintain strict confidentiality; professional temperament and appearance; ability to communicate effectively in oral and written forms using correct spelling, grammar, and punctuation; knowledge and understanding of the Catholic Church in general and the Diocese of Sacramento specifically; and ability to work and relate to a variety of personalities and cultures with diplomacy, friendliness, and poise. Candidate must be bilingual (English and Spanish).

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SIGNATURE OF EMPLOYEE

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DATE

\_\_\_\_\_  
SIGNATURE OF SUPERVISOR

\_\_\_\_\_  
DATE