

HEARTBEAT INTERNATIONAL

Job Description

TITLE: Gift Processing Assistant
CLASSIFICATION: Non-exempt; Full-time
DEPARTMENT(S): Mission Advancement (MA)
REPORTS TO: Development Director
LOCATION: Columbus, OH

SUMMARY

The Gift Processing Assistant plays a vital role in fostering donor trust by ensuring every gift is processed accurately, acknowledged promptly, and handled with exceptional care. This position helps maintain the integrity of Heartbeat International's donor database, proactively contacts donors to resolve routine gift-processing matters, and provides excellent stewardship to those who invest in Heartbeat's life-saving mission.

PRIMARY RESPONSIBILITIES

1. Gift Processing

- Process and import gifts received through mail, online giving, electronic funds transfer (EFT), donor-advised funds, stock gifts, and other giving methods accurately and promptly in accordance with established procedures.
- Scan, upload, and maintain supporting gift documentation while ensuring the confidentiality and accuracy of donor and financial records.
- Prepare and process donor acknowledgments and receipts promptly.
- Ensure accurate gift reporting and documentation for the Accounting team.
- Monitor gift processing workflows to ensure gifts and acknowledgments are completed accurately and on time.
- Work independently to identify, investigate, and promptly communicate any discrepancies or unusual gift-processing issues to the appropriate team member.

2. Donor Stewardship

- Proactively contact donors to resolve routine gift processing matters, including incomplete, declined, or inaccurate payment information.
- Communicate with donors in a professional, courteous, and Christ-centered manner that reflects Heartbeat International's commitment to excellent stewardship.
- Maintain clear and accurate records of donor communications related to gift processing.
- Escalate complex donor concerns or questions to the appropriate Mission Advancement team member.

3. Donor Database Maintenance

- Maintain accurate and complete donor records within Virtuoso.
- Update donor data as discrepancies are identified during daily work, demonstrating strong attention to detail.
- Assist with ongoing data cleanup projects, including duplicate records, address updates, returned mail, and other data quality initiatives.
- Identify inconsistencies or recurring data issues and communicate recommendations for resolution.

- Support the overall health, integrity, and usability of the donor database.
- Learn and apply new processes, software features, and best practices that improve donor data quality and operational efficiency.

4. Mission Advancement Support

- Collaborate with team members to sort and distribute incoming mail according to departmental procedures.
- Assist with donor mailings, special projects, and other Mission Advancement initiatives as needed.
- Cross-train to provide coverage for essential department functions during staff absences.
- May participate in the phone answering team as needed.

SUPERVISION (Received/Exercised)

Work performed independently with supervision available. Plan, prepare, and organize work to meet deadlines and project needs. Expected to make routine decisions requiring analysis and interpretation regarding task completion that does not significantly impact other areas with limited guidance from supervisor.

REQUIREMENTS

1. High school diploma or equivalent required.
2. One to three years of experience working in an administrative, customer service, office support, financial processing, or related role preferred.
3. Experience with data entry, recordkeeping, or maintaining accurate records required.
4. Demonstrated ability to learn new software systems and adapt to changing processes.
5. Experience using a CRM or database system preferred; Virtuous experience is a plus.
6. Proficiency with Microsoft Office applications, particularly Word and Excel.
7. Strong organizational skills with the ability to manage multiple priorities while maintaining a high level of accuracy.
8. Ability to communicate professionally and courteously by phone, email, and in person, including effectively collaborating with a hybrid team.
9. Demonstrated ability to handle confidential information with discretion.
10. Commitment to Heartbeat International's mission, vision, core beliefs, and core operational values.