

**United Way Kingston, Frontenac, Lennox & Addington**  
**JOB DESCRIPTION**

<b>Job Title:</b>	Data Entry Associate		
<b>Reporting to:</b>	Manager, Database		
<b>Job Classification</b>	Level 1: Associate, Coordinator (Entry Level position)		
<b>Department:</b>	Corporate Services		
<b>Creation Date:</b>	May 2018	<b>Revision/Review Date:</b>	November 2018, April 2020, November 2020, July 2021, August 2021

**SUMMARY**

The Data Entry Associate provides accurate data entry to the database, and maintains data on an on-going basis. This position provides general administrative and data-entry support to the Manager, Database and to the Finance & Facilities Manager, including report generation, preparing letters, data mining operations, and data verification. Working closely with the database team, this position provides support to the ePledge process as required.

The Data Entry Associate ensures all donors receive accurate, personalized, thank you letters and receipts in a timely manner as per specific process and procedures. They facilitate the volunteer thanking process, maintaining accurate records and information sharing, keeping privacy guidelines in mind.

**DUTIES & RESPONSIBILITIES**

Data Entry (25%)

- Inputs information accurately into the database, as per established protocols and procedures and maintains updated records
- Maintains data integrity as per established standards
- Reviews and keeps database, shared files, and contacts updated and accurate at all times
- Updates, maintains and distributes campaign reports from donor database on daily, weekly and monthly basis, as per established timelines
- Runs data mining operations to generate the desired results for reports and special requests of information
- Verifies data integrity through duplicate management and analysis

Leadership Giving Data and Records (25%)

- Implements processes and procedures to track, monitor and ensure all Leaders and Friends (Donors giving \$500+) are appropriately recognized with Thank You letters, and produce receipts in an accurate, timely fashion

- Distributes and tracks thank you calls to Leaders and Friends, ensuring all are thanked as per Donor relationship Management plans and thanking procedures
- Works closely with CEO to provide research, and information to develop profiles for key donors
- Assists with the analysis of data records for Leaders and friends
- Supports Database Manager with the Leadership & MIG direct mail merge process
- Tracks and provides attendee lists and support for events and affinity groups to CEO to ensure Friends, Leaders and MIG are provided appropriate support and recognition

#### Campaign, Reports and Data (15%)

- Supports the campaign with reports, input and maintenance of accurate information
- Updates and maintains contact information in database, developing and maintaining updated lists
- Assists with charts and data for campaign analysis and mid-campaign analysis
- Works with Vice President, Corporate Services on end of campaign envelope audit
- Supports CEO and campaign staff with donor analysis and updates, reports
- Working closely with Database Manager, pulls mail merge data and merge processes to produce letters and pledge forms for direct mail

#### eCommunity Builder (15%)

- Provides support to Community Impact staff related to Community Building module
- Inputs data, processes updates and generates reports
- Assists staff with charts, reports, transfer of information related to outcomes, impacts, grants and allocations applications

#### ePledge (10%)

- Generates reports, donor analysis and updates for workplace ePledge campaigns
- Assists in reconciling ePledge reports between UW KFLA and individual workplaces
- Support in data uploads related to ePledge campaigns as well as e-list management
- Troubleshoots web User IDs for ePledge accounts
- Working closely with Database Manager, prepares end of year reports to workplace payroll / HR departments
- Monitors usage and provides regular reporting on progress of workplace ePledge campaigns to Database Manager

#### Other Duties (10%)

- Other duties or tasks may be assigned based on the business needs of the organization

## **EDUCATION AND EXPERIENCE**

### Education:

- Diploma or degree from a recognized post-secondary institution in database management, or equivalent education and experience

### Experience:

- Minimum of one year's experience in a busy non-profit or complex office setting
- Minimum of one year's experience using basic database principles and basic HTML coding

### Skills & Abilities:

- Sound computer skills including: spreadsheets, word processing, email / internet, database and / or fundraising software
- Strong administrative skills, including filing, sorting, and organization of information
- Ability to understand, express and apply concepts and instructions of a general nature as well as somewhat technical / scientific / administrative concepts, methods and procedures
- Ability to use moderately complicated formulae, tables and graphs
- Strong written, verbal, interpersonal and communication skills
- Proven time management skills and ability to effectively organize work in an environment with competing work duties
- Well-developed analytical and reasoning skills
- Ability to work in a flexible office environment and pay attention to detail
- A committed team player who is also able to work in a self-directed manner

## **COMPLEXITY OF DECISIONS**

Typical decisions include setting own priorities, ensuring workload is balanced effectively and taking actions in an effort to coordinate requests made by internal sources.

Judgement may require some interpretation of variables and the situation at hand as this role identifies and advises on data integrity issues and revises reports in Andar.

Support and guidance for decision making is readily available.

## **MANAGEMENT / SUPERVISORY AND ADVISORY RESPONSIBILITY**

### Direct Supervision:

- There are no direct reports for this position.

### Indirect Supervision:

- There are no indirect reports for this position.

## **TYPE OF SUPERVISION REQUIRED / INDEPENDENCE OF ACTION**

The Data Entry Associate operates with some independence of action and works under general supervision. Methods and procedures are available however questions dealing with unusual matters are referred to supervisor(s).

### **CONSEQUENCE OF ERROR**

Typical errors may include miscommunication of information and / or the preparation and dissemination of content that is incorrect or not accurate. These errors are most often detected before they are communicated externally and most often result in lost time.

More serious errors could result in adverse impacts on the UW KFLA's image and reputation.

### **CONFIDENTIALITY**

The Data Entry Associate is privy to some confidential information related to activities of the organization and impacts within the community. Disclosure could have a moderate impact externally.

### **CONTACTS**

#### Internal:

- President & CEO, Vice President, Corporate Services, Managers, Staff
- Nature of the Contact – supporting initiatives, reports, etc.

#### External:

- The Data Entry Associate distributes information to key volunteers

### **PHYSICAL EFFORT**

- Majority of time is spent in a comfortable position with frequent opportunity to move about
- Infrequent need to move or lift articles

### **PHYSICAL SKILLS**

- Regular need to give close attention, either hearing or seeing, to what is happening
- Requirement to work at a computer, keyboarding, etc.

### **WORKING CONDITIONS**

#### Physical:

- Located in a comfortable indoor area
- Unpleasant conditions are infrequent and very mild

#### Stress:

- Work and environment change very little over time
- Some pressure from deadlines, production quotas, accuracy or similar demands
- Some mildly unpleasant social contacts and / or some concern about possible unpleasant situations are possible

## COMPETENCIES

The United Way Worldwide has developed an extensive Competency Model Framework. The Framework supports a common set of competencies to ensure that each United Way is able to attract, grow and retain the right people who have key competencies in areas that are fundamental to our mission and strategic direction.

Specific definitions, traits and behaviours are outlined the Framework titled: United Way Worldwide Competency Models. Those specific competencies that apply this this position are:

- Mission focused
- Relationship oriented
- Collaborator
- Results driven
- Brand steward
- Critical Thinking & Creative Problem Solving