



### Job/Position Description

<b>Position Title:</b> Donor Relations Coordinator	<b>Department Name:</b> Foundation
<b>UPH Affiliate:</b> Methodist   Proctor Foundation, Pekin Hospital Foundation	<b>Department Number:</b> 5040-9081000
<b>Effective Date:</b> 8/1/2019	<b>Review Date(s):</b>
<b>Prepared By:</b> Kate Carroll	<b>Approved By:</b>
<b>Position Reports To:</b> Director, Foundation	

<b>Description of Position:</b>
Provide a "snapshot" or the principal purpose or focus of the position, consisting of no more than three to five sentences. This summary should provide enough information to differentiate the major function and activities of the position from those of other positions.
The Donor Relations Coordinator is a key role on the UnityPoint Health Foundation team. This person is responsible for maintaining the donor database, as well as creating the systems, reports, and processes to ensure the reliability and accuracy of the data. Duties will include helping identify gift prospects through donor analytics tools. The Donor Relations Coordinator will also monitor the preparation and tracking of grant reports as needed, balance and prepare monthly financial reports for accounting department and prepare Foundation reports for Boards and Committee meetings in conjunction with the accounting department.

<b>Essential Functions/Responsibilities:</b>	<b>% of Time (annually)</b>
<p>Essential functions are the duties and responsibilities that are essential to the position (not a task list). Do not include if less than 5% of work time is spent on this duty. Be specific without giving explicit instructions on how to perform the task. Do not include duties that are to be performed in the future. Duties should be action oriented and avoid vague or general statements.</p> <p><b>Manage and Maintain Database</b></p> <ul style="list-style-type: none"> <li>• Maintain a comprehensive and accurate database of constituent and donor records.</li> <li>• Manage data needs and creates user rights, funds, table, and configuration for the data system.</li> <li>• Conduct global changes as well as data imports/exports, utilizing Excel as well as other software programs.</li> <li>• Generate accurate database queries and reports that provide the information required to make informed decisions by staff.</li> <li>• Maintain accuracy and integrity of all donor data files, implements quality control mechanisms, performs data entry and oversees the data entry policies and procedures.</li> <li>• Assist in the development of new database processes to meet current and future fundraising goals, as well as participating in the planning and execution of all upgrades and technology enhancements to advance the mission of the Foundation.</li> <li>• Provide support and training to all users of the database as needed.</li> <li>• Coordinate and process recurring donations</li> <li>• Perform data entry of donor contact changes / updates</li> <li>• Perform online gift entry reporting</li> <li>• Process credit card transactions</li> </ul>	40%
<p><b>Facilitate Donor Communication and Engagement</b></p> <ul style="list-style-type: none"> <li>• Manage requests from donors and grant recipients</li> <li>• Manage record-keeping and reporting of grants throughout the UPH regional entities, teams, and departments</li> <li>• Achieve development team fundraising targets through exceptional follow-up with donor pool</li> </ul>	20%

<ul style="list-style-type: none"> <li>• Communicate with donors as necessary to return misdirected donations or inform of problems with checks or credit card payments</li> <li>• Identifies, researches, and cultivates donors through the creation of strategic, long-term stewardship plans and management of daily stewardship activities</li> <li>• Sends thank you letters, receipts, annual giving letters, and Partners in Unity letters to donors</li> </ul>	
<p><b>Support Foundation Events, Campaigns, and Projects</b></p> <ul style="list-style-type: none"> <li>• Manage Employee Giving Campaign</li> <li>• Support Planning of Annual Gala</li> <li>• Support Capital Campaign efforts through donor communications</li> <li>• Support Planning of Partners in Unity annual event</li> <li>• Support Planning of Methodist College Scholarship Breakfast</li> <li>• Provides monthly development reports regarding fundraising goals, initiatives, and progress to Director of Development</li> <li>• Facilitates and tracks UPH system foundation goal-setting, metrics, and reporting</li> <li>• Identify planned giving prospects and support system planned giving strategy</li> </ul>	20%
<p><b>Manage Grants</b></p> <ul style="list-style-type: none"> <li>• Distribute and update all grant applications upon request.</li> <li>• Follow-up on grant applications to ensure required approval signatures obtained in timely manner to be approved by Vice President and/or Board.</li> <li>• Maintain all grant files in Foundation office, including application, requests, and travel records.</li> <li>• Communicate regularly with Grant sources and appropriate UnityPoint Health-Methodist staff and assist with and/or prepare reports as needed.</li> <li>• Track awards, billing and reimbursement of grants</li> </ul>	10%
<p><b>Basic UPH Performance Criteria</b></p> <ul style="list-style-type: none"> <li>• Demonstrates the UnityPoint Health Values and Standards of Behaviors as well as adheres to policies and procedures and safety guidelines.</li> <li>• Demonstrates ability to meet business needs of department with regular, reliable attendance.</li> <li>• Employee maintains current licenses and/or certifications required for the position.</li> <li>• Practices and reflects knowledge of HIPAA, TJC, DNV, OSHA and other federal/state regulatory agencies guiding healthcare.</li> <li>• Completes all annual education and competency requirements within the calendar year.</li> <li>• Is knowledgeable of hospital and department compliance requirements for federally funded healthcare programs (e.g. Medicare and Medicaid) regarding fraud, waste and abuse. Brings any questions or concerns regarding compliance to the immediate attention of hospital administrative staff. Takes appropriate action on concerns reported by department staff related to compliance.</li> </ul>	10%
<p><b>Disclaimer:</b> This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.</p>	
<p><b>Demonstration of UPH Values and Standards of Behaviors</b> Consistently demonstrates UnityPoint Health's values in the performance of job duties and responsibilities</p>	
<p><b>Foster Unity:</b></p>	<ul style="list-style-type: none"> <li>• Leverage the skills and abilities of each person to enable great teams.</li> <li>• Collaborate across departments, facilities, business units and regions.</li> <li>• Seek to understand and are open to diverse thoughts and perspectives.</li> </ul>
<p><b>Own The Moment:</b></p>	<ul style="list-style-type: none"> <li>• Connect with each person treating them with courtesy, compassion, empathy and respect</li> <li>• Enthusiastically engage in our work.</li> <li>• Accountable for our individual actions and our team performance.</li> <li>• Responsible for solving problems regardless of the origin.</li> </ul>
<p><b>Champion Excellence:</b></p>	<ul style="list-style-type: none"> <li>• Commit to the best outcomes and highest quality.</li> <li>• Have a relentless focus on exceeding expectations.</li> </ul>

	<ul style="list-style-type: none"> <li>Believe in sharing our results, learning from our mistakes and celebrating our successes.</li> </ul>
<b>Seize Opportunities:</b>	<ul style="list-style-type: none"> <li>Embrace and promote innovation and transformation.</li> <li>Create partnerships that improve care delivery in our communities.</li> <li>Have the courage to challenge the status quo.</li> </ul>

**QUALIFICATIONS:**

	<b>Minimum Requirements</b> Identify items that are minimally required to perform the essential functions of this position.	<b>Preferred or Specialized</b> Not required to perform the essential functions of the position.
<b>Education:</b>	Associate's Degree in Business, Communication, or IT preferred	
<b>Experience:</b>	1-3 years of experience using Raiser's Edge or other related database systems	
<b>License(s)/Certification(s):</b>	Valid driver's license when driving any vehicle for work-related reasons.	
<b>Knowledge/Skills/Abilities:</b>	<p>Communication Skills</p> <ul style="list-style-type: none"> <li>Adapt communication style when working with variety of personalities</li> <li>Maintain confidential information</li> <li>Communicate in a clear and concise manner</li> <li>Project a professional, helpful and friendly demeanor</li> </ul> <p>Customer Service Skills</p> <ul style="list-style-type: none"> <li>Serve customer / client / team members</li> <li>Solve problems quickly and efficiently</li> <li>Follow up with customer / client / team members as needed</li> </ul> <p>Computer Skills</p> <ul style="list-style-type: none"> <li>Proficient in Raiser's Edge or other similar database systems</li> <li>Intermediate computer knowledge</li> <li>Ability to troubleshoot minor problems with Windows OS</li> <li>Operates within network environment</li> <li>Basic / Intermediate knowledge of Excel, Word, PowerPoint, and other MS Office Apps</li> <li>Ability to learn new applications quickly and without difficulty.</li> </ul>	
<b>Other:</b>	Use of usual and customary equipment used to perform essential functions of the position.	

**SCOPE:** Position has supervisory responsibilities? Yes  or No  If yes, complete below.

<b>Number of Employees Supervised</b> (Complete if position has supervisory responsibilities of individuals)			
	Direct	Indirect	Total
Exempt			
Non-Exempt			
Total			

<b>Budget Control</b> (Complete if position has budget responsibilities)	
Annual Operating Budget (including payroll)	
Annual Revenue/Sales	
<b>Other Scope Measurements</b>	
Pertinent to the position, such as number of beds, number of units/departments, number of employees leading, cases per month, etc.	
Item	Number

<b>Mental/Cognitive Demands:</b> (List any special mental and cognitive abilities required by the position in your specific environment)
<ul style="list-style-type: none"> <li>Type in mental and/or cognitive demands</li> </ul>

**WORKING CONDITIONS:**

<b>Physical Requirements</b> (Check all that apply if essential to perform job – with or without accommodations)
<input checked="" type="checkbox"/> Talk/Hear (communicate, detect, converse with, discern, convey, express oneself, exchange information)
<input checked="" type="checkbox"/> See (defect, determine, perceive, identify, recognize, judge, observe, inspect, estimate, assess)
<input checked="" type="checkbox"/> Stand or Sit (stationary position)
<input checked="" type="checkbox"/> Walk (move, traverse)
<input checked="" type="checkbox"/> Use hands/fingers to handle or feel (operate, activate, use, prepare, inspect, place, detect, position)
<input checked="" type="checkbox"/> Climb (stairs/ladders) or Balance (ascent/descent, work stop, traverse)
<input checked="" type="checkbox"/> Bend/Stoop/Kneel
<input checked="" type="checkbox"/> Squat/Crouch/Crawl
<input checked="" type="checkbox"/> Reaching/Twisting
<input checked="" type="checkbox"/> Taste/Smell (detect, distinguish, determine)
<input checked="" type="checkbox"/> Pushing/Pulling

<b>Lifting Requirements</b> (Check appropriate category to perform job – with or without accommodations)
<input type="checkbox"/> <b>Level 1; Sedentary Work:</b> Exerting up to 10 pounds of force occasionally, and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally, and all other sedentary criteria are met.

<input checked="" type="checkbox"/> <b>Level 2; Light Work:</b> Exerting up to 20 pounds of force occasionally or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. Requires walking or standing to a significant degree, pushing or pulling arm or leg controls or maintaining a production rate pace. Light work requires physical exertion of forces greater than that of sedentary work.
<input type="checkbox"/> <b>Level 3; Medium Work:</b> Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/> <b>Level 4; Heavy Work:</b> Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/> <b>Level 5; Very Heavy Work:</b> Exerting in excess of 100 pounds of forces occasionally, and/or in excess of 50 pounds of force constantly to move objects.

<b>Hazards and Atmospheric Conditions</b> (check all that apply)	
<input checked="" type="checkbox"/> Normal Office Surroundings	<input type="checkbox"/> Vibration
<input type="checkbox"/> Exposure to Fumes	<input type="checkbox"/> Mechanical Hazards
<input type="checkbox"/> Exposure to Dust	<input type="checkbox"/> Chemical Hazards
<input type="checkbox"/> Exposure to Extreme Temperatures	<input type="checkbox"/> Electrical Hazards
<input type="checkbox"/> Wet and/or Humid	<input type="checkbox"/> Radiant Energy Hazards
<input checked="" type="checkbox"/> Noise	<input type="checkbox"/> Explosives Hazards
<input type="checkbox"/> Mists or Gases	<input type="checkbox"/> Burn Hazards
Other/Comments: Precautions must be followed when working in any health care environment.	

<b>OSHA Categories</b> (Complete this OSHA section for clinical/patient related jobs)
<input type="checkbox"/> <b>Category I:</b> Duties performed routinely require exposure to blood, body fluid and tissue.
<input type="checkbox"/> <b>Category II:</b> Normal routine involves no exposure to blood, body fluid or tissue, but exposure or potential for exposure may occur.
<input checked="" type="checkbox"/> <b>Category III:</b> Normal routine involves no exposure to blood, body fluid, or tissue and as part of their employment, incumbents are not called upon to perform or assist in emergency care or first aid.

<b>To Be Completed by Compensation Analyst</b>	
<b>FLSA Designation:</b>	<b>Lawson Job Level:</b>
<b>Lawson Job Category:</b>	<b>Lawson Job Sub-Category:</b>
<b>Lawson Job Code:</b>	<b>Lawson Job Title:</b>
<b>Short Term Incentive Eligibility:</b>	<b>Union Affiliation:</b>