



# THE WHEELER SCHOOL

## **Gift Processing Associate**

Founded in 1889, The Wheeler School is a co-educational independent day school for over 800 students from Nursery through Grade Twelve in Providence, Rhode Island. Central to the School's philosophy is a simple concept: Wheeler is a place where we strive to make any pursuit possible for our students, where choice, inquiry, and interest are of primary import, where we know individuals well and insist upon and nurture intellectual character, empathy, critical thinking, and creative spirit.

Ideal candidates for faculty and staff positions at Wheeler are people with a sense of humor, warmth, and humility. They are excellent communicators, with an ability to listen and a desire to learn from colleagues. They are ambitious and hardworking, often going over and above to support and challenge students. When developing curriculum and programming, our faculty and staff members are collaborative, striving each year to stretch and grow, to implement new ideas that improve the Wheeler experience for students and our overall community. They come from all professional walks of life - graduate programs, private and public schools, other careers entirely. More than anything, our faculty and staff members love to spend their days with young people, and enjoy all that the Wheeler community - creative, energetic, dynamic, and diverse - has to offer.

## **Gift Processing Associate**

**Reports to: Senior Advancement Services Manager**

**Date to be filled: Immediate Hire**

### **Overview:**

The Gift Processing Associate has primary responsibility for maintaining all gift transactions, acknowledgements, and donor files, as well as preparing all necessary gift reports for The Wheeler School and Breakthrough Providence.

**Job Duties and Responsibilities:**

Using The Raiser's Edge software, enter gifts into appropriate fund accounts daily as they are received by the Institutional Advancement (IA) office, with special attention paid to accurately documenting donor restrictions and/or pledge payment schedules. Generate timely acknowledgement letters and pledge reminders for donors; generate and assure accuracy of reports when needed by IA and Business Office personnel, including weekly gift reports. Maintain accurate and complete donor files. Other duties as assigned.

**Key Qualifications:**

- The Raiser's Edge or similar fundraising software experience strongly preferred
- Filing experience (both paper and software files)
- Able to prioritize in a fast-paced work environment

**Specific Duties (not inclusive of every task related to each duty):**

- Record all gifts and pledges in The Raiser's Edge software (daily)
- Prepare and send acknowledgment letters for all gifts made to Wheeler and Breakthrough Providence (48 hour turn around)
- Generate all pledge reminders to donors according to Pledge Reminder Schedule and as needed or requested
- Gifts of Securities: process as appropriate
- Coordinate all Matching Gifts to ensure timely fulfillment of gifts
- Reconcile credit card charges
- Manage and run gift reports, as assigned
- Verify accuracy of donor information in the database, as it relates to addresses and contacts
- Maintain accurate and complete donor (hard) files throughout the year
- Generate weekly gift reports for distribution to appropriate staff members
- Prepare, as needed, IA Request for Adjustment Form and subsequent changes required for accurate gift entry
- Track and prepare write-off reports for May IA and Finance meetings
- Maintain schedule and process checks for Gift Annuity beneficiaries or other related planned gifts
- Monitor and respond to gifts or inquiries at [giving@wheelerschool.org](mailto:giving@wheelerschool.org), with Director of Annual Giving
- Support Stewardship Program procedures as needed
- Prepare reports, donor lists and other gift information for Annual Report
- Coordinate with Business Office regarding gift entry and necessary reporting
- Prepare reports needed for Index and Benchmark Reports

**Business Office and Audit Preparation:**

- Generate reports as scheduled and/or requested, including quarterly, audit, INDEX and Benchmark reports
- Coordinate end of year gift entry with Business Office to reach year-end closing deadlines
- Organize files for yearly audit requests
- Generate Gift Detailed Reports as needed
- Generate pledge confirmation letters to selected donors chosen by the Auditors
- Answer questions regarding gifts, pledges, stock transfers, filing procedures, or other issues identified

**Personal Attributes:**

Accurate and detail oriented; able to prioritize and function well in a fast-paced office environment; unflappable; patient but goal oriented and able to meet deadlines; familiar with accounting principles and The Raiser's Edge fundraising software; friendly, positive, cheerful; able to work well with others.

**Statement on Diversity ([full statement can be found here](#))**

At Wheeler we actively seek students, faculty, and staff from diverse backgrounds in the belief that a broad range of experiences and viewpoints enhance learning, enrich life on campus, and better prepare us all for full participation in a pluralistic, democratic society. We seek to further the overall diversity within our community through hiring.

*The Wheeler School is committed to our policy of nondiscrimination and equal opportunity for all employees and qualified applicants without regard to race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin or disability, and any other category protected by federal, state, or local law.*

**HOW TO APPLY:**

Please send your resume and cover letter to Emily Anderson at [careers@wheelerschool.org](mailto:careers@wheelerschool.org), listing the position title in the subject heading. We will be sure it is directed to her and the search committee as appropriate.