



TEAM: Relationships & Giving

TITLE: Donor Data & Finance Coordinator

REPORTS TO: COFO

DOTTED LINE: Vice President

CLASSIFICATION: Part-Time (20–30 hours/week), Mostly on-site; some remote

JOB SUMMARY

The Donor Data & Finance Coordinator plays a critical stewardship role at Joppa by ensuring the accurate recording, processing and reconciliation of donor, donation and financial data. This position supports both financial integrity and donor trust by maintaining precise records, honoring donor intent and upholding confidentiality across all systems.

Working closely with the COFO and in partnership with the Relationships & Giving team, this role is responsible for donor and donation data entry, bookkeeping functions, reconciliation and donor acknowledgment processes across Joppa’s CRM and accounting systems. Exceptional attention to detail, sound judgment and personal integrity are essential.

This role is highly trusted and detail-oriented. The ideal candidate views this work not simply as data entry or bookkeeping, but as a calling to steward resources, relationships and information with accuracy, discretion and care in service of Joppa’s mission.

ESSENTIAL FUNCTIONS

Donor Data & Donation Stewardship

- Accurately record all donations, donor information and gift details in Joppa’s CRM and donor management systems
- Ensure donor records reflect correct contact information, preferences, anonymity requests and giving history
- Generate and send IRS-compliant donation receipts and personalized acknowledgment letters in a timely manner
- Honor donor intent, restrictions and recognition preferences with precision and care
- Ensure new donors are properly entered into systems and enrolled in appropriate communication workflows (e.g., receipts, newsletters and event invitations), in alignment with donor preferences and organizational guidelines
- Maintain confidentiality and discretion when handling donor information and communications

Bookkeeping & Financial Recordkeeping

- Record day-to-day financial transactions accurately in QuickBooks Online (QBO)
- Verify transactions are properly recorded in the general ledger
- Perform bank reconciliations and review general ledger accounts
- Bring books to the trial balance stage and support month-end close
- Prepare checks for payment and process check runs in accordance with internal controls and authorization policies



- Initiate and process approved electronic payments and transfers (e.g., ACH, online bill pay), following established approval and documentation procedures
- Make physical bank deposits, including cash and check deposits, in accordance with organizational cash-handling policies
- Process accounts payable and receivable transactions in a timely manner
- Assist with gathering documentation for audits, tax filings and financial reviews
- Perform other routine bookkeeping and financial recordkeeping duties as assigned, consistent with internal controls and role scope

Systems, Accuracy & Compliance

- Maintain data accuracy and consistency across CRM, donor management and accounting systems
- Follow all cash-handling, payment authorization and financial control policies
- Support system integrity through careful data entry, reconciliation and documentation
- Identify discrepancies or errors promptly and escalate appropriately

Collaboration & Support

- Work closely with the COFO on financial processes, reporting and controls
- Coordinate with the Vice President and Relationships & Giving Team to support donor stewardship and data integrity
- Communicate clearly and professionally with internal staff and, when appropriate, donors
- Support special projects and administrative tasks as assigned

PROFESSIONALISM & RELIABILITY

- Demonstrates integrity, humility and accountability
- Exercises exceptional attention to detail and accuracy
- Maintains strict confidentiality with sensitive financial and donor information
- Demonstrates reliability, consistency and responsiveness
- Exercises sound judgment, especially when handling exceptions, discrepancies or sensitive matters
- Willingness to learn, grow and adapt within the role
- Ability to pass a background check and uphold Joppa's Code of Conduct and organizational policies

CUSTOMER SERVICE & TEAMWORK

- Professional, respectful and service-oriented demeanor
- Ability to communicate clearly, accurately and courteously
- Ability to work independently while remaining aligned with team priorities
- Ability to receive feedback and implement improvements



MINIMUM QUALIFICATIONS

Education & Experience

- High school diploma or equivalent required
- Associate or bachelor's degree in Accounting, Finance or Business Administration preferred
- Minimum of 2 years of bookkeeping or financial data entry experience
- Experience with donor databases or CRM systems preferred
- Nonprofit experience a plus

Skills & Competencies

- Proven accuracy in data entry and financial recordkeeping
- Solid understanding of basic bookkeeping and accounting principles
- Experience with QuickBooks Online strongly preferred
- Proficiency with Microsoft 365, spreadsheets and database systems
- Highly organized, methodical and detail-oriented
- Excellent written and verbal communication skills, including strong grammar and punctuation
- Ability to handle confidential information with discretion and care
- Comfortable working in an entrepreneurial, mission-driven environment