

## Job Description

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<b>Job Title:</b>	Alumni and Donor Services Assistant
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Manager, Alumni and Donor Services
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 5
<b>Effective Date:</b>	February 2018

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### **Primary Purpose**

The Alumni and Donor Services Assistant is accountable to the Manager, Alumni and Donor Services for applying knowledge of policies and procedures in performing all functional activities related to alumni, donor and prospect records including the recording of all donation revenue for the University of Waterloo.

Advancement staff and other university stakeholders rely heavily on the accurate records maintained by the Alumni and Donor Services Assistant for reporting, strategy and revenue generation.

### **Key Accountabilities**

#### **Researches, analyzes and manages the entry of donation revenue and biographical information in the advancement database**

- Performs research using a variety of resources to identify donors and their relationships with mindfulness of the tax, donor stewardship, and reporting implications of their work
- Reviews and proofreads database updates and donation submissions for completeness and compliance with CRA and privacy legislations, University policy, Affiliated and Federated Institutes of Waterloo (AFIW) agreement and advancement business rules; follows up with donors and internal stakeholders as needed
- Creates and updates database records following strict business rules for alumni, donors, corporations, friends, students and parents
- Applies specialized knowledge of gift-types for cash and non-cash gifts including planned gifts, gifts in kind, gifts of securities, and sponsorships to accurately record all donation revenue for the University of Waterloo.
- Applies knowledge of Canadian Anti-Spam legislation and the Freedom of Information and Protection of Privacy Act (FIPPA) to comply and maintain accurate records of donor communication preferences

#### **Processes data imports/exports to and from database**

- Applies specialized knowledge to process bi-weekly and monthly payroll deductions through an interface with the Human Resources Management System (HRMS); updates all staff and faculty biographic information as reported by HR and collaborates with HR when discrepancies in deductions or information surface
- Applies specialized knowledge of advancement database software and its integration with real time credit card processing and knowledge of Payment Card Industry (PCI) compliance to process e-commerce donations; trouble-shooting and testing the online giving platform in conjunction with the manager, systems team, and annual giving is required
- Processes secure monthly automatic donation deductions directly with the University's bank adhering to established pre-authorized debit agreements with donors

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<ul style="list-style-type: none"><li>• Reviews, validates and researches data from the Registrar's office for recording of convocation/degree data, name changes, gender reassignments and death notices</li></ul>
<b>Financial Accountabilities</b> <ul style="list-style-type: none"><li>• Reconciles financial data in a variety of formats to validate accuracy of information, including donor identity, fund to credit and receiptable amount prior to submission to Gift Administration Officer for posting to general ledger</li><li>• Participates in providing support for annual year-end audit and periodic CRA or internal audits</li><li>• Adheres to strict financial deadlines including month-end, year-end, automatic payroll and credit card and debit account transactions.</li></ul>
<b>Communication and Stakeholder focus</b> <ul style="list-style-type: none"><li>• Performs advanced database functions of queries, exports and merges to generate batches of specialized letters of acknowledgements, reminders and receipts</li><li>• Determines when a gift should be brought to the attention of management for a specialized stewardship action</li><li>• Responds to sensitive and confidential alumni and donor inquiries with respect to their biographical information, communication preferences and giving history; uses judgement as to when a donor inquiry of a sensitive nature should be escalated to management or Gift Administration Officer for input</li><li>• Provides advice and direction to internal stakeholders campus-wide regarding advancement policies and procedures, confidentiality, and database coding and reporting</li></ul>
<b>Support Ongoing Improvement Initiatives</b> <ul style="list-style-type: none"><li>• Creates, reviews and updates complex Alumni and Donor Services procedures for both internal and external stakeholders</li><li>• Collaborates with Data Steward to ensure integrity of data</li><li>• Assists and supports special projects within the Office of Advancement</li><li>• Provides other administrative support as required</li></ul>

## Required Qualifications

<b>Education</b> <ul style="list-style-type: none"><li>• Post-secondary education in administration of business and/or equivalent work experience</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• 2 years' experience of data management in an enterprise level database</li><li>• Demonstrated experience working in a computerized financial environment including reconciliations</li><li>• Experience in an employed or volunteer capacity in the charitable or not for profit sector is preferred</li><li>• 2 + years Customer service experience an asset</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Sound knowledge of CRA guidelines, privacy regulations, and charitable sector rules and regulations</li><li>• Proficiency in database operations on a customer relationship management (CRM) database or financial system. Experience with Raiser's Edge software is preferred.</li><li>• Proficiency in a network environment with Windows with a variety of software applications including email, Excel, Word and web navigation</li><li>• Ability to handle multiple tasks and show good time management</li><li>• Proven aptitude for accurate and detailed data entry</li><li>• Ability to handle confidential matters with a high level of integrity</li><li>• Customer service orientated and effective interpersonal approach</li><li>• Able to work in an independent and team environment</li></ul>

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- Aptitude for understanding how business rules and information is structured
- Strong math and language skills
- Ability to understand policies and procedures and influence best practices

### **Nature and Scope**

- **Contacts:** External Stakeholders: Effectively communicate with alumni and donors with discretion, sensitivity and confidentiality. Internal Stakeholders: Seek clarification, discuss information and trouble shoot problems with all units in a decentralized Advancement unit. Interacts with SAFA, GSO, Registrar's Office, HR, and Finance. Position is team-oriented with both independent work and daily contact and workflow variances with team members to be expected.
- **Level of Responsibility:** The Alumni and Donor Services Assistant must apply knowledge of University policies/procedures, advancement business rules and external legislative regulations to process donations and update records on the Advancement database. They must seek clarification, address compliance issues and resolve discrepancies with internal and external client groups.
- **Decision-Making Authority:** Applies explicit guidelines and procedures in making decisions. Predominately makes straightforward decisions based on adequate information. May also be required to make decisions by weighing several factors, some of which are partially defined and entail missing pieces of critical information. Supports and acts on decisions. In complex or sensitive situations, issues may need to be elevated to the Gift Administration Officer or Manager.
- **Physical and Sensory Demands:** Moderate sensory demands typical of a position requiring concentration and attention to detail for prolonged periods in a customer focused environment with regular interruptions and competing priorities
- **Working Environment:** Exposure to conditions typical of working in an office environment. There is moderate exposure to disagreeable conditions in the form of disgruntled customers. No travel required, occasional weekend and evening work might be required.