

Job Description

Job Title:	Customer Relations and Department Assistant
Department:	Office of Advancement
Reports To:	Associate Director, Operations
Jobs Reporting:	None
Salary Grade:	USG 4
Effective Date:	October 2017

Primary Purpose

The Customer Relations and Department Assistant is responsible for providing the first point of contact for customer service representing the Office of Advancement to alumni, donors, students, faculty and staff. This position works with confidential information and handles sensitive information responsibly, professionally and in compliance with privacy regulations. The position provides data entry and administrative support to operational activity in the Office of Advancement and will be cross-trained to fill in as a Records Assistant or Gifts Assistant during peak times.

Key Accountabilities

List the major responsibilities of the job, divided into 3 to 5 broad categories. These should reflect 80 - 90% of "what" the job does not the "how". Insert a category heading and in bullet form below, state specific responsibilities.

Customer Service Support

- Provides effective customer service support at the main Office of Advancement reception area to alumni, donors, students, faculty, staff and volunteers in person, by phone or by email
- Provides information and shares knowledge on a wide variety of topics including accepting donations, purchasing frames and registering for events
- Escalates inquiries as necessary to appropriate subject matter experts
- Books meeting rooms, arranges visitor parking and gives directions to a wide variety of clientele which may include corporate executive officers or alumni in senior positions
- Provides cross-training to the records team, administrative assistants and co-op students on reception duties. Maintains up to date SOP's for all reception duties for times of records and gifts area coverage
- Front counter frame sales to walk in customers

Operational Team Support

- Handles the first phase of cash/donations acceptance process with a firm understanding of cash handling and PCI compliance policies and procedures
- Data entry of basic gifts and biographical records into Raiser's Edge during peak times, staff absences or data cleanup projects. (Example, issuing of replacement charitable tax receipts from Feb – April)
- On-site support of Alumni Relations convocation activities
- Communicates to donors via phone or email seeking updated credit card information, or to make arrangements for past due payment on a pledge.
- Preparation of certain gifts for data entry (College Transfer new donor additions and researching and coding charitable foundations on Raiser's Edge database)

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- Support for Training Officer in onboarding new employees by assembling new employee binders, folders and welcome kits and creating new signage around the office
- Performs non-routine duties as assigned

General Office Administration

- Organize the office supply inventory
- Distribution of mail
- Maintain a database of new employees, employees on leaves or secondments, co-op students and report on staff changes monthly, update interoffice directory accordingly

Required Qualifications

If hiring today, what would be the required education, experience, knowledge, skills and abilities?

Education

- Enrolled or completion of a college program or a combination of education and experience

Experience

- Up to two years of business experience in an operational/administrative role.
- Previous experience in an advancement/fundraising environment is preferred.
- Highly developed customer service skills to provide exceptional customer service.

Knowledge/Skills/Abilities

- Attention to detail as demonstrated by proven data entry skills.
- Ability to multi-task and prioritize work.
- Professionalism – able to maintain confidentiality of donor information.

Nature and Scope

- **Contacts:** Externally communicates with wide variety of clients – from students to senior executives. Must have strong verbal and written communication skills and be able to demonstrate professionalism and a friendly welcoming manner. Internally communicates with Advancement staff from central team, faculties and AFIW members, must be able to maintain relationships and communicate with team members to resolve data, administrative and transactional issues related to area of responsibility. The incumbent must be fully trained in donor relations skills (donor-centric stewardship) and use tact and diplomacy in following up on past due pledges and credit card expiries.
- **Level of Responsibility:** This position is responsible for supporting processes within the Advancement services team ensuring that all practices meet defined quality and service objectives. Responsible for ensuring confidentiality of data and donor interactions is maintained. Responsible for continual self-assessment and training in area of Gifts and Records to keep skills refreshed and ready for backup as needed. This position has defined duties and responsibilities with no direct reports.
- **Decision-Making Authority:** Responsible for decision making and problem solving within the parameters of the process that is being supported. Investigates issues, provides information and explanation to those involved and makes adjustments/corrections as necessary.
- **Physical and Sensory Demands:** Moderate sensory demands typical of a busy customer focused environment with varying levels of interruptions, physical demands of long periods of computer data entry may occur during times of Records and Gifts coverage. Periods of standing to serve customers during convocation support 3 times per year
- **Working Environment:** As a front line customer service position there is moderate exposure to disagreeable conditions related to conflict with customers. Regular interruptions to support customers is to be expected.