

## Job Description

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<b>Job Title:</b>	Manager, Alumni and Donor Services
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Associate Director, Operations
<b>Jobs Reporting:</b>	Matching Gift Specialist, Alumni and Donor Services Assistants (6)
<b>Salary Grade:</b>	USG 8
<b>Effective Date:</b>	April 2018

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### **Primary Purpose**

The Manager of Alumni and Donor Services is accountable to the Associate Director, Operations for the coordination and direction related to all activities associated with donor, alumni and prospect records and donation processing 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.

The role is responsible for day-to-day operations to ensure that the alumni and donor services team provides efficient, accurate and timely support with a donor-centered focus.

### **Key Accountabilities**

#### **Managing, Leading and Motivating Staff**

- Hires, supervises, mentors, evaluates and handles disciplinary matters for staff members reporting to him/her, ensuring compliance with UW policies and employment laws
- Manages interview committees and the selection of top talent
- Creates and maintains a work environment that fosters, recognizes and rewards supportive mentorship, professional quality, respectful communication, creativity, positive energy, and excellent customer service
- Coaches and supports team through changes to systems, advancement policies and procedures and strategy in relation to day-to-day workflow and coding responsibilities
- Collaborates with Advancement Training Officer in the delivery of on-going training and professional development that is pro-active and timely for each staff member

#### **Manages Gift Processing Functions**

- Oversees, and ensures proper coordination and prioritization of deliverables including database management, deposits, reconciliations, receipting and acknowledging gifts for the University of Waterloo, The Friends of the University of Waterloo Foundation and the Hong Kong Foundation
- Oversees financial activities of the team including adherence to financial deadlines, Payment Card Industry (PCI ) compliance and audit support; collaborates and acts on advice of the Financial Officer
- Coordinates with Gift Administration Officer in ensuring completion of posting to the general ledger
- Ensures team is following University policies/procedures, CRA guidelines, and donor stewardship best practices; demonstrates sound judgement to determine when a gift should be escalated to the Gift Administration Officer for review
- Responsible for overseeing the secure, timely and accurate processing of gifts received via electronic interfaces including EFT real-time credit card processing, payroll interfaces and

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<p>automated pre-authorized debit transactions; troubleshoots and strategizes issues, sometimes with urgent timelines</p> <ul style="list-style-type: none"><li>• Coordinates with Associate Director of Stewardship and Donor Relations to maintain a suite of standard letters of acknowledgement which are updated yearly</li><li>• Identifies and implements continuous improvements in gift processes; ensures staff are encouraged and rewarded for seeking and bringing forward ideas that foster that environment</li></ul>
<p><b>Manages Records Functions</b></p> <ul style="list-style-type: none"><li>• Oversees, and ensures proper coordination and prioritization of deliverables. Creating and maintaining database records researching and updating records accordingly and special database clean-up projects</li><li>• Accountable for accurate and consistent coding standards being deployed in the database, in collaboration with the Data Steward and following a data governance framework</li><li>• Oversees the team in running critical data imports and exports from the registrar's office, requiring expert database knowledge; strategizes and troubleshoots issues that arise</li><li>• Collaborates closely with the Data Steward to recommend and/or implement changes and training in Alumni and Donor Services functions that improve data quality</li><li>• Acts as a key resource and functional expert to the Systems team in development, mapping, testing and design of new software interfaces and critical imports/exports</li><li>• Manages process of researching and merging duplicate constituent records in Advancement databases</li><li>• + Identifies and implements continuous improvements in record processes; ensures staff are encouraged and rewarded for seeking and bringing forward ideas that foster that environment</li></ul>
<p><b>Other</b></p> <ul style="list-style-type: none"><li>• Discerns when ongoing process improvement initiatives in the Alumni and Donor Services team functions ; have department-wide implications and collaborates with Associate Director, Operations or Data Steward as appropriate</li><li>• Oversees and approves writing and maintaining of complex procedures for both record and gift database functions, collaborating with Data Steward as appropriate</li><li>• Leads or participates in committees, implementation teams and special projects as directed by Associate Director, Operations</li><li>• Coordinates and supplies staff for coverage of Advancement reception for breaks, illness and vacation</li><li>• Other duties as assigned</li></ul>

### Required Qualifications

<p><b>Education</b></p> <ul style="list-style-type: none"><li>• Post-secondary education in business, administration or accounting and/or equivalent work experience</li></ul>
<p><b>Experience</b></p> <ul style="list-style-type: none"><li>• 3-5 years of database operations experience preferably in a University environment</li><li>• 2-3 years management experience</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></ul>
<p><b>Knowledge/Skills/Abilities</b></p> <ul style="list-style-type: none"><li>• Sound knowledge of CRA guidelines, privacy regulations, and charitable sector rules and regulations</li></ul>

- Demonstrated ability to thrive in and contribute to an integrated and collaborative team environment, and to apply a positive team approach to working with colleagues
- Strong organizational and problem solving skills
- Flexibility, diplomacy and sound judgement
- Proficiency in database operations preferably with Raiser's Edge; experience with alternative customer relationship management (CRM) database or financial system may be substituted
- Proficiency in a network environment with Windows with a variety of software applications including email, Excel, Word and web navigation
- Ability to communicate with sensitivity and confidentiality
- Customer service and relationship building focus
- Ability to make decisions and act independently as required balanced with the ability to influence, build consensus, and encourage cooperation between units
- Ability to handle confidential matters with a high level of integrity

### **Nature and Scope**

- **Contacts:** Internal Stakeholders: Communicates with staff in the department to influence and motivate, and with other advancement departments for compliance and to collaborate and reach agreement on implementation plans. Keeps Associate Director, Operations informed of any issues requiring escalation. External Stakeholders: Effectively communicates with alumni and donors with discretion, sensitivity and confidentiality. Handles communications of sensitive nature in collaboration with Gift Administration Officer, and Associate Director of Stewardship and Donor Relations.
- **Level of Responsibility:** This position is accountable to the Associate Director, Operations for the overall results of the Alumni and Donor Services Team, ensuring that all processes and procedures are compliant and meet defined quality and service objectives. Works collaboratively with the Associate Director, Operations to develop and initiate advancement specific initiatives in a decentralized environment. Job has specialized skills and is the subject matter expert on records and gifts functions. Requires minimal supervision and provides direct supervision to a medium sized cross-trained team.
- **Decision-Making Authority:** Responsible for setting direction and establishing the priorities of the Alumni and Donor Services team, ensuring data quality and implementing best practices.
- **Physical and Sensory Demands:** Minimal sensory demands typical of a management position operating in a busy customer focused environment with regulatory driven deadlines and shifting priorities.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a management position. May be required to work additional hours during peak times and year end or in relation to system related emergencies. Will deal with sensitive donor/alumni situations.