

Job Description

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| Job Title: | Gift Administration Officer |
| Department: | Office of Advancement |
| Reports To: | Associate Director, Operations |
| Jobs Reporting: | None |
| Salary Grade: | USG 8 |
| Effective Date: | May 2018 |

Primary Purpose

The Gift Administration Officer exercises a high degree of judgement in the review, analysis and preparation of specialized, highly sensitive or high value donations for entry and posting into the University of Waterloo's databases. The Gift Administration Officer has expert knowledge of the Advancement database and performs several specialized reporting and import/export functions within the database. In collaboration with the Advancement Finance Officer s/he maintains the funds and Unit 4 G/L accounts and is accountable for all posting to the general ledger. In collaboration with the Associate Director, Operations, participates in special projects to ensure effective, efficient and compliant gift processing and document retention practices are developed and maintained.

Key Accountabilities

Reviews, analyzes and advises on the handling of specialized, sensitive or high value donations

- First point of contact in gifts processing for fully signed trust and endowment gift agreements
- Reviews agreement for completeness, sensitive dates, and compliance with gift processing policies and procedures and advises on data entry protocol
- Follows up with internal and external stakeholders with mindfulness of the sensitivity of the ongoing donor relationship
- Troubleshoots and advises on complex gift scenarios as escalated from the Alumni and Donor Services Manager and others; resolving issues may involve broad collaboration with de-centralized advancement teams, UW finance, stewardship and donor relations, Student Awards & Financial Aid (SAFA) and Graduate Studies, among others
- Review and approval for data entry of other revenue such as sponsorships and non-cash gifts of property (Gifts in Kind)

Performs specialized functions in the Advancement Database

- Creates, updates and disables fund records on Raiser's Edge for new trust and endowment funds as approved by UW Finance and Advancement finance
- Approves and advises on complex adjustments to giving histories; performs all adjustments to and from the Advancement suspense account and reconciles suspense account
- In coordination with Alumni and Donor Services team, runs G/L posting process including performing data integrity checks, reviewing and correcting exceptions and errors
- Approves and uploads donation revenue to G/L; advises manager of errors and omissions
- Acts as an expert on Gifts module of the database; works closely with systems team and other stakeholders to develop a highly efficient and logical database
- Manages preparations for database conversion

Generates Gift Processing Reports

- Generates standardized reports and distributes campus-wide
- Generates data integrity reports as required, in conjunction with the Data Steward

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| <ul style="list-style-type: none"> • Designs, creates and generates other exports, queries or reports as directed by the Associate Director, Operations |
| <p>Communications and Stewardship</p> <ul style="list-style-type: none"> • Reviews and approves for release all donation reminders for major, corporate and VIP donors • Acts as a resource to advancement professionals across campus |
| <p>Other</p> <ul style="list-style-type: none"> • Develops and implements an effective document management program for the Advancement Operations team • Creates and maintains all financial and gift processing forms on internal document sharing site and coordinates with the Communications team to update and provide content for web-based forms on the Advancement website • Participates as a functional expert representative in gift processing system upgrade and testing project teams • Coordinates and/or participates in other advancement projects as directed by Associate Director, Operations |

Required Qualifications

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| <p>Education</p> <ul style="list-style-type: none"> • Post-Secondary education and/or equivalent work experience |
| <p>Experience</p> <ul style="list-style-type: none"> • 3-5 years' experience in a gift or revenue processing role • Experience applying generally accepted accounting principles • Demonstrated experience working in a computerized financial environment • Experience in an employed or volunteer capacity in the charitable or not for profit sector is preferred |
| <p>Knowledge/Skills/Abilities</p> <ul style="list-style-type: none"> • Knowledge of University of Waterloo policies related to gift acceptance and CRA charity guidelines • 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 handle multiple tasks and competing priorities with exceptional attention to detail • Ability to handle confidential matters with a high level of integrity • Customer service orientated and effective interpersonal approach • Ability to perform tasks in a highly complex environment exercising a high degree of judgment in applying guidelines and policies • Knowledge of generally accepted accounting principles |

Nature and Scope

- **Contacts:** External Stakeholders: Effectively communicate with alumni and donors with discretion, sensitivity and confidentiality. Must be able to professionally communicate policies and procedures including CRA receipting guidelines and ensure compliance. Keeps Associate Director, Operations informed of any issues requiring/under investigation. Internal Stakeholders: Seek clarification, discuss information and trouble shoot problems with all units in a decentralized Advancement team. Interacts with SAFA, GSO, Registrar's Office, HR, and Finance.
- **Level of Responsibility:** The Gift Administration Officer must apply an expert level of knowledge of University policies/procedures, advancement business rules and external legislative regulations to either advise on or execute the accurate and compliant processing of highly sensitive donations not

handled in the regular stream of general donations. The position is expected to influence and make recommendations to Associate Directors, Managers and team members without a direct reporting relationship.

- **Decision-Making Authority:** This job is specialized work with minimal supervision and provides guidance to others on complex and sensitive cases. Decisions may be based on pre-determined guidelines and processes but more often are based on exercising sound judgment and weighing several factors, some of which are partially defined and entail missing pieces of critical information. Supports and acts on decisions in areas of functional responsibility.
- **Physical and Sensory Demands:** Minimum sensory demands typical of a position requiring concentration and attention to detail 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 minimum exposure to disagreeable conditions in the form of disgruntled customers. Will deal with sensitive donor situations.