

## Job Description

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<b>Job Title:</b>	Records Specialist, Data Quality
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Manager, Data Quality
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 6
<b>Effective Date:</b>	June 2018

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### **Primary Purpose**

The Records Specialist is accountable to the Manager, Data Quality for coordinating projects to update and maintain the database with information that specifically supports strategic prospect research data mining and initiatives. The role will also provide key support to the Manager, Data Quality in sustaining ongoing quality, accuracy, and completeness of operational data for the Office of Advancement.

The Records Specialist, Data Quality will work collaboratively with the Prospect Research team and other Advancement teams to help ensure we apply, maintain and code gift, and biographical data points strategically in support of revenue generation by fundraising activities.

### **Key Accountabilities**

#### **Researches, analyzes, and coordinates the entry of strategic biographical and donor engagement information into the advancement database**

- Reviews and analyzes complex record updates as forwarded by the prospect research team or others. Performs research using a variety of resources and collaborates with advancement colleagues from several teams to seek clarity.
- Collaborates with the Associate Director of Prospect Research to proactively research and update donor records aligning with strategy and core areas of focus for the faculty fundraising teams
- Working closely with the Manager, coordinates and prepares data projects that require the resources of the Alumni and Donor Services (ADS) team to complete.
- Collects strategic data from areas across campus that can be used in prospecting and data mining activities ensuring adherence to University of Waterloo policies and procedures and Federal privacy regulations.
- Organizes or participates on committees or projects designed to uncover and deliver (via data points) actionable insights that Advancement teams can use in their engagement, cultivation, or solicitation efforts.

#### **Development and implementation of a comprehensive lost alumni program**

- Coordinates and liaises with central and faculty Advancement teams to create a program that uses data strategically in alignment with current Advancement initiatives to find and engage lost alumni in the activities of the University.
- Executes all aspects of the lost alumni program, This may involve seeking direct input from faculty advancement teams, coordinating with the stewardship and alumni relations teams, direct contact with alumni, coordinating creation and delivery of specific marketing packages and updating data.
- Seeks and maintains relationships with lost alumni in a sensitive and positive way.
- Hires, supervises, and trains a work study student to research lost alumni, as required.

#### **Data Stewardship**

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<ul style="list-style-type: none"><li>• Executes queries, exports and reports for data quality or cleansing efforts.</li><li>• Supports the ADS team with challenging database updates that may fall outside the normal stream of updates.</li></ul>
<b>Support Ongoing Improvement Initiatives</b> <ul style="list-style-type: none"><li>• Creates, reviews and updates complex procedures for both internal and external stakeholders relevant to their role.</li><li>• Assists and supports special projects within the Office of Advancement.</li></ul>
<b>Other</b> <ul style="list-style-type: none"><li>• Is knowledgeable, trained, and able to perform all functions of the Alumni and Donor Services Assistant as required.</li><li>• Other duties as assigned.</li></ul>

*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

### **Required Qualifications**

<b>Education</b> <ul style="list-style-type: none"><li>• Post-secondary education and/or equivalent work experience</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• 2-3 years' experience of data management on an enterprise level database</li><li>• Knowledge of University of Waterloo and Advancement policies and procedures would be an asset</li><li>• Experience in an employed or volunteer capacity in the charitable or not for profit sector is preferred</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Ability to take initiative, influence and recommend business improvements</li><li>• Creative and strategic thinker</li><li>• Excellent donor-centered communication skills, both written and oral</li><li>• Strong organizational skills, attention to detail and ability to apply a high degree of accuracy to work</li><li>• Proficient database skills preferably with Raiser's Edge; experience with alternative customer relationship management (CRM) database or financial system may be substituted</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 complete work in a timely manner</li><li>• Ability to handle confidential matters with a high level of integrity</li><li>• Able to work in an independent and team environment</li></ul>

### **Nature and Scope**

- **Contacts:** External Stakeholders: Effectively communicate with individual alumni and donors with discretion, sensitivity and confidentiality. Internal Stakeholders: Collaborates with colleagues widely across campus to gain cooperation in gathering and maintaining data.
- **Level of Responsibility:** This position is accountable to the Manager, Data Quality for oversight of a lost alumni program for the Office of Advancement. The role will be expected to collaborate and work quite closely with the Associate Director of Prospect Research on special projects. The role may be expected to manage competing deadlines and priorities from several units within Advancement and must inspire colleagues to work collaboratively towards a common goal.

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- **Decision-Making Authority:** Applies specialized knowledge in making decisions but will also creatively apply current Advancement strategy to determine decisions or make database recommendations. 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.
- **Physical and Sensory Demands:** Moderate 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. Occasional weekend and evening work may be required.