

Job Description

Job Title:	Development Coordinator
Department:	Office of Advancement
Reports To:	Director, Development
Jobs Reporting:	Co-op students
Salary Grade:	USG 6
Effective Date:	August 2019

Primary Purpose

The Development Coordinator is responsible for providing administrative and executive support to the Director, Development and the Development team.

Under the direction of the Director, Development, the Development Coordinator takes responsibility for administrative, financial, human resources, facilities and planning functions, as well as data management oversight and some communications.

Key Accountabilities

Administrative support

- Provides a wide range of administrative support to the Director, Development;
- Manages the Director's schedule; arranges meetings, including fundraising, volunteer and other calls and travel for the Director and other Development team members;
- Co-ordinates multiple participants' calendars
- Facilitates meetings by booking facilities and refreshments, preparing presentations, handouts and reports; produces meeting notes and attends to special requests;
- Researches and prepares reports, letters, agendas, solicitation packages, briefing notes and a variety of other materials to support the Development team;
- Runs and distributes a variety of reports using the Advancement Database (Raiser's Edge/RE) to support the fundraising function; requests additional RE data and reports as required;
- Interacts with the Office of the President, Provost, VP Advancement and other administrators to relay information, seek advice, and engage parties in visits/events/meetings;
- Manages Development team's equipment needs and orders supplies and marketing materials;
- Manages Development team's paper and electronic filing systems and implements administrative systems and structures including work processes and procedures;
- Provides advice and support to the Director on the development and management of effective administrative systems and protocols;
- Acts as back up support for other administrators in department
- Maintains current knowledge of Advancement practices and protocols

Finance and budgeting

- Assists with the unit's annual budget preparation;
- Prepares cheque requests, purchase orders, shipping orders, travel and expense claims and other paperwork as required;
- Provides advice, critical analysis and reporting on the organization and implementation of financial priorities to the Director of Development
- Has signing authority on some expense payments.
- Monitors and handles the monthly account reconciliation of the Development team, and maintains

Job Description



expense records for all transactions.

- Creates reports from the Advancement database (Raiser's Edge) and UW Financial Systems
- Acts as a team resource for querying the Financial System for specific details, prepares special summary reports on expense activity for some program areas, tracks down invoice irregularities and liaises with various billing points on and off campus
- Manages the team Purchasing Card, including reconciliation of accounts, payment of invoices, tracking of purchases and reconciliation of monthly statement.
- Prepares and processes paperwork required for payments to internal and external vendors

Fundraising and donor relations support

- Making cold calls to book face-to-face meetings for development officers(DO)
- Maintains RE database action entry for DOs and Director
- Prepares trust and gift agreements
- Prepares Fund Request Forms and ensures gifts are directed to appropriate funds
- Assists with proposal preparation for potential donors
- Prepares internal reports to monitor the progress of fundraising goals including: metrics reports for DO's, tool usage statistics (e.g. LinkedIn Navigator), etc.
- Prepares briefing notes, and/or briefing binders for DOs and the Director as needed in collaboration with research team
- Maintains top prospect lists and distributes these as necessary;
- Provide administrative support for the development of promotional materials

HR Support

- Assists Director with ensuring team's job descriptions are up to date
- Assists Director with recruitment and onboarding of new hires
- Recruits, trains and supervises co-op students.
- Directs co-op students on specific tasks/projects at the Director's request.

Other

- Administers and coordinates special projects and departmental initiatives; analyzes data, creates PowerPoint and other graphic presentations.
- Performs research to assist in the preparation of reports, letters, agendas, call packages, training notes, and a variety of other materials; performs initial review of material to analyze, sort, resolve issues, and answer queries.
- Assists with the planning and execution of key events and meetings.
- Other duties as assigned.

**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

Education

- Post-secondary degree or diploma or equivalent combination of education and experience.

Experience

- Several years of administrative experience in a complex, dynamic and fast-paced environment.
- Experience with financial reconciliation and budgeting.
- Experience in a development environment an asset.
- Experience coordinating events an asset.

Knowledge/Skills/Abilities

- Intermediate to advanced MS Office, Basic Experience with web content management software or willingness to learn, knowledge of Raiser's Edge or similar relational database an asset.
- Experienced in creating PowerPoint presentations with charts, graphs and animation.
- Strong financial reporting skills including budget development, oversight and forecasting.
- Excellent ability to work both independently and as a team member.
- Sound judgement, tact, diplomacy and problem solving skills.
- Well-developed organizational, analytical, interpersonal, customer service skills.
- Strong communication skills – oral and written.
- Effective organizational and time management skills: able to manage a high volume of tasks and projects often with tight deadlines.
- Strong organizational and analytical skills in the gathering and manipulation of data.
- Attention to detail and accuracy is essential.
- Knowledge of the University's policies and procedures an asset

Nature and Scope

- **Contacts:** Works closely with other positions reporting to the Director. Internally, the Development Coordinator communicates with multiple departments and at all levels to work within the priorities of the Development portfolio. Externally, this position will have significant contact with key external stakeholders and will act on behalf of the Director, Development and the University of Waterloo.
- **Level of Responsibility:** The position is responsible for managing and the direct supervision of 1-3 Co-op students. Responsible for performance measurements and evaluation of the Co-op students. Must be able to make informed decisions with awareness of the impact of that decision on internal and external stakeholders. Must be cognizant of implications of all actions on broader university community. Ability to take initiative with minimal direction. Proactively contributes ideas and solutions to the Director and other team members. Establishes individual performance goals and an annual performance plan in consultation with the Director.
- **Decision-Making Authority:** Directs administrative functioning of the Development team. Manages co-op students in project-based initiatives and recommends program modifications when necessary. Assists with decisions on timelines, budget and staffing resources for Development. Assists with decisions on the most efficient use of the Director's time (i.e. attendance at meetings, events, speaking engagements, international travel). Makes recommendations that enhance systems/processes/programs that support the priorities of the Directors and DO's.
- **Physical and Sensory Demands:** This position works independently and requires outstanding client service, sound judgement, a strong work ethic and an ability to work under challenging time constraints, constant interruptions and changes to priorities. Extended time on the computer.
- **Working Environment:** Flexibility in working hours and some evening/weekend work required. Minimal exposure to disagreeable conditions typical of a supervisory position. The position is office based with limited travel.