

Job Description

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| Job Title: | Matching Gift Specialist |
| Department: | Office of Advancement |
| Reports To: | Manager, Alumni and Donor Services |
| Jobs Reporting: | none |
| Salary Grade: | USG 6 |
| Effective Date: | January 2018 |

Primary Purpose

The Matching Gift Specialist is accountable to the Manager of Alumni and Donor Services for the oversight of matching gift and third-party donation processes and database updates for the Office of Advancement. In addition, the role will be knowledgeable in all functional activities related to alumni, donor and prospect records and donation processing in order to provide back-up and support to the Alumni and Donor Services team.

Matching and third-party gifts are an increasing source of donation revenue and have evolved to be predominately web-based with the necessity to meet complex and regulatory requirements of specific industries and companies. The Matching Gift Specialist will play a vital role in recommending and implementing matching gift processes that increase revenue and enhance both individual and corporate donor relationships.

Key Accountabilities

Development and implementation of a comprehensive matching gift process

- Uses knowledge of regulatory (CRA/IRS) and industry specific standards and best practices related to matching gifts when processing donations
- Collaborates with, and provides technical advice to, Annual Giving team on implementation and backend support of ongoing solicitation and revenue generating activities to maximize matching gift opportunities
- Researches company information using a variety of sources to proactively update and maintain matching gift eligibility and percentage details on Advancement database
- Validates and approves gifts for matching on a variety of web platforms or via paper process and provides the matching gift corporate partner with the necessary format to clear for payment to the University
- Researches, streamlines and accurately enters matching gift donation revenue into the advancement database
- Follows up by automated process and/or personal interaction on status of unpaid matching gift claims
- Reconciles payment with UW banking to identify incoming payments
- Obtains and maintains detailed instructions, passwords and access to any matching gift platforms with which the University interacts

Development and implementation of processes for accepting, posting and receipting third-party gifts

- Uses knowledge of regulatory (CRA/IRS) and industry specific standards and best practices related to third party giving when processing donations

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| <ul style="list-style-type: none">• Manages the processes for tracking and receipting gifts from the University's two international giving foundations, The Friends of the University of Waterloo Foundation and the Hong Kong Foundation; uses knowledge of IRS and Hong Kong Inland Revenue requirements to issue receipts and track donation revenue on the advancement database. Discerns when to escalate matters to the manager for further follow up or clarification• Collaborates with the Alumni and Donor Services Manager or Finance Officer to set up accounts and access to new third party giving platforms as they arise• Liases with UW Banking to track EFT revenue coming from new or unknown third party giving platforms and communicates with corporate or donor contacts to seek clarification• Acts as main point of contact for third party giving staff (i.e. United Way, Canada Helps, Benevity) |
| Communication and Relationship Management <ul style="list-style-type: none">• Communicates directly with individual donors to make the match process as effortless as possible• Coordinates and liaises with corporate donation or payroll departments in regards to administration of their matching gift programs; trouble-shoots and resolves any issues that arise• Acts as campus resource on matching and third-party giving policies, procedures and processes |
| Support Ongoing Improvement Initiatives <ul style="list-style-type: none">• Creates, reviews and updates complex gift matching procedures for both internal and external stakeholders• Collaborates with Data Integrity Manager to ensure integrity of data• Assists and supports special projects within the Office of Advancement |
| Other <ul style="list-style-type: none">• Is knowledgeable, trained and able to perform all functions of the Alumni and Donor Services Assistant as required• Other duties as assigned |

Required Qualifications

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| Education <ul style="list-style-type: none">• Post-secondary education and/or equivalent work experience |
| Experience <ul style="list-style-type: none">• 2-3 years gift processing experience on an enterprise level database• Knowledge of University of Waterloo and Advancement policies and procedures would be an asset• Demonstrated experience working in a computerized financial environment including reconciliations• Experience in an employed or volunteer capacity in the charitable or not for profit sector is preferred |
| Knowledge/Skills/Abilities <ul style="list-style-type: none">• Ability to take initiative, influence and recommend business improvements• Sound knowledge of CRA/IRS guidelines, privacy regulations, and charitable sector rules and regulations• Excellent donor-centered communication skills, both written and oral• Strong organizational skills, attention to detail and ability to apply a high degree of accuracy to work• Proficiency in gift processing 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 complete work in a timely manner• Ability to handle confidential matters with a high level of integrity• Able to work in an independent and team environment |

Nature and Scope

- **Contacts:** External Stakeholders: Effectively communicate with individual alumni and donors with discretion, sensitivity and confidentiality. Liaise effectively with corporate representatives to facilitate processes. Internal Stakeholders: Seek clarification, discuss information and troubleshoot problems with all units in a decentralized Advancement unit.
- **Level of Responsibility:** This position is accountable to the Manager, Alumni and Donor Services for oversight of matching and third party gift processing for the Office of Advancement, including implementation of new matching gift arrangements and program recommendations.
- **Decision-Making Authority:** Applies specialized knowledge in making decisions. Decisions are predominately based on pre-determined guidelines and processes. 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. There is moderate exposure to disagreeable conditions in the form of disgruntled customers. No travel required, occasional weekend and evening work may be required.