

## Job Description

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| <b>Job Title:</b>      | Advancement Coordinator, School of Accounting and Finance (SAF)        |
| <b>Department:</b>     | School of Accounting and Finance                                       |
| <b>Reports To:</b>     | Associate Director Advancement, School of Accounting and Finance (SAF) |
| <b>Jobs Reporting:</b> | None   |
| <b>Salary Grade:</b>   | USG 6  |
| <b>Effective Date:</b> | March 2018   |

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### **Primary Purpose**

The Advancement Coordinator is responsible for administrative and event support related to fundraising and alumni relations programs for the School of Accounting and Finance (SAF) Advancement team.

### **Key Accountabilities**

#### **Alumni and Development Administration**

- Provides a wide range of administrative support to the Advancement team;
- Manages the team's schedule and calendars; arranges meetings, including fundraising, volunteer and alumni relations calls;
- Facilitates all aspects of 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, media kits, briefing notes and a variety of other materials;
- Uses Raiser's Edge and Advancement Tracker to support the fundraising function; requests data and reports as required; enters status notes;
- Co-ordinates communication activities with the Office of Alumni Affairs;
- Prepares monthly consolidation of disbursements and expenses;
- Updates the SAF Advancement Alumni web site provides support for the management of the UW SAF Alumni Association;
- Manages local, regional and international travel as required;
- Maintains current knowledge of Office of Advancement practices and protocols and familiarity with issues in advancement more broadly.

#### **Gift Management**

- Manages the process for award and gift agreements as appropriate and prepares preliminary documentation for award terms;
- Coordinates gift agreements and endowment reports;
- Maintains an accurate account of SAF scholarships, awards, and endowments;
- Prepares annual mailings as required and ensures appropriate distribution of award agreements;
- Assists with annual distribution of endowment reports for scholarships and other projects and maintains files of endowment reports.

#### **Fundraising, Alumni Events, and Communication**

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- Facilitates the coordination of the alumni and donor strategic events;
- Handles logistics, including menu planning, venue liaison, and parking requirements;
- Coordinates alumni award nominations for the Alumni Awards Celebration;
- Assists with the content for the SAF Alumni & Friends E-Newsletter;
- Assists with the strategic coordination of social media activities.

### Required Qualifications

#### **Education**

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

#### **Experience**

- Several years of administrative experience in a complex, dynamic and fast-paced environment
- Experience in a development, university or sales/marketing environment an asset

#### **Knowledge/Skills/Abilities**

- Intermediate in MS WORD, EXCEL, POWERPOINT
- Basic experience with web content management software or willingness to learn
- Knowledge of Raiser's Edge or similar relational database an asset

### Nature and Scope

- **Contacts:** This position requires communication with internal and external contacts to arrange and coordinate meetings, obtain, clarify and discuss information, and to assist in event management. Contact groups and individuals include but are not limited to:  
*Internal:* the SAF Advancement team, SAF Director, faculty and staff members, Student Awards Office, Graduate Studies Office, Development and Alumni Officers across campus, Office of Advancement staff, External Relations team and Communications and Public Affairs.  
*External:* prospective donors, donors, alumni, volunteers, executives in corporations and external suppliers.
- **Level of Responsibility:** The position has defined specialized and routine tasks. The Advancement Assistant receives specific guidance but is expected to perform duties with relative independence thereafter.
- **Decision-Making Authority:** Some decision-making authority. Examples include:
  - Determining task priority in a multitasking, deadline-oriented environment;
  - Ensuring that SAF Advancement materials prepared for use with internal and external constituents are appropriate and accurate;
  - Determining the office's equipment and supply requirements.
- **Physical and Sensory Demands:** Typical of an administrative position in an office environment; peak times can include many simultaneous demands.
- **Working Environment:** Travel: occasional travel to events and meetings  
Working hours: regular, occasional evening/weekend work may be required  
Risks, physical and psychological: no significant risks.