**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Donations & Research Associate

**Job Number:** SO-207

**NOC:** 1431

**Band:** 6

**Department:** Advancement Services

**Supervisor Title:** Director, Advancement Services

**Effective Date:**  July 15, 2019

**Job Purpose**

Reporting to the Director of Advancement Services, and taking daily activity direction from the Advancement Services Officer, the Donations & Research Assistant is responsible for the processing and entry of all pledges, payments, gifts, securities, gifts-in-kind, funds, and related donor record changes, as well as the electronic and paper filing of all related materials. Additionally, the incumbent maintains and prepares necessary materials and donation activity reports to support internal or external donation audits, fund allocations meetings, and requests for donor and fund activity; including system query and analytical reviews to both produce the reports and ensure accuracy of the information provided. The incumbent provides outstanding and confidential donor-client related communication in all forms; various letter correspondence, in-person, as well as, via phone and email.

The Donations & Research Assistant conducts ongoing prospect screening and other low-level prospect research activities, including donor tracing and donor record updates.

**Key Activities**

***Donations Processing, Analytics and Reporting***

1. Using The Raiser’s Edge and Net Community systems, accurately enters all pledge, payments, gifts, securities and gift-in-kind information, Creates all necessary pledge payment and frequency schedules. Ensures all relevant gift information is captured in its predetermined system field and that donor information on file is accurate prior to, and post, gift processing.
2. Transmits and communicates all gift entry information to University finance department for processing and assists with any reconciliation to the general ledger, banking activity, and payment service providers.
3. Manages all donor pre-authorized schedules, including payroll deductions schedule.
4. Produces all ‘at-the-transaction’ and annual tax receipts for donors, including any required additional correspondence such as acknowledgments, thank you letters etc.
5. Assists with creating and maintaining all system fund records, requiring direct communication with the University finance department to ensure two-way fund setup and general ledger synchronization.
6. Contributes to Development and Advancement Services plans as requested in relation to job functions.
7. Provides professional and outstanding client-donor communication via written correspondence, phone calls, emails, and in-person; in a confidential, sensitive and secure manner, including the preparation and sending of paper and electronic pledge reminders to donors
8. Maintains all necessary audit and annual tax reporting documentation.
9. Prepares bank deposits.
10. Produces and transmits all electronic and written batch and gift information to finance department.
11. Develops and produces routine query based reports relating to gift and donor activity as required.

***Prospect Research Support***

1. Under the direction of the Advancement Services Officer, performs screening tasks such as internet searches or reviews using vendor supplied prospect data sites in order to assist with the identification of donor prospects.
2. As requested by the Advancement Services Officer, conducts donor tracing activities such as demographic information finding or other donor attributes using various electronic and search techniques.
3. Updates prospect records and information as requested.

***Administrative Support***

1. Stays current on CRA donation regulations and guidelines using CRA website and communicates relevant changes to the Director of, Advancement Services any noted changes.
2. Prepares all necessary audit related materials and collaborates with auditors as requested to achieve audit success; introducing new compliancy procedures as instructed.
3. Prepares monthly departmental credit card submission for signature and submits to finance department.

***Collaborate on Other Assignments***

1. Provides support on special projects as determined by the Director of Advancement Services.

**Education**

Undergraduate degree or advanced college diploma (3 years)

**Experience Required**

1. Minimum one year, of experience using The Raiser’s Edge software.
2. Two years directly related experience in data entry and gift processing, with one year of administrative or office experience.
3. Demonstrated outstanding client-service skills.
4. Demonstrated analytical and reasoning skills to initiate and perform routine analyses, produce reports and organize donation information, as well as conduct routine research activities
5. Strong computer skills and exposure to system query generation. In addition to The Raiser’s Edge software requirement, the candidate is expected to be well-versed using MS Word and MS Excel. Excellent oral and interpersonal skills, required to function effectively with University donors, major gift team, staff, faculty and other constituencies. Ability to work in a team environment.
6. Demonstrated ability to work independently, prioritize work, and meet deadlines.
7. Ability to maintain confidentiality and work with sensitive information.
8. Ability to recall, recognize and communicate interrelated information pertaining to University donations, donors and funds.
9. Flexibility to work on occasional weekends and evenings.

**Communication**

Internal:

* contact for various reasons when required by Vice-President, or portfolio Directors
* Financial Aid Officer: to exchange information on new funds, existing funds, etc.
* Development Staff, to assist with donation and gift entry questions.
* Advancement Services Officer, this position is directly responsible for the day-to-day activities of the role and therefore there is frequent contact to discuss procedures, identify errors and corrections, diagnose system issues, review data entry, and pass information for audits and fund allocation meetings and the like.

External:

* Donors (Annual Fund, Major Gift Program): for numerous reasons, e.g. Tax receipts, funds information, NSF cheques, & many other reasons too numerous to list
* Bank personnel: to discuss bank accounts, statements, credit card queries, pre-authorized service, sale of securities
* Auditors - discuss system reports and assist with necessary documents for audit
* Vendor for supplies

**Motor/ Sensory Skills**

* Fine Motor Skills - Keyboarding
* Dexterity
* Visual - Keyboarding

**Effort**

Mental:

* Sustained concentration - Mental concentration and observation required to enter financial information concentrating on accuracy

Physical:

* Eye strain - Strain on eyes to view computer monitor
* Sitting for extended periods - Physical effort to sit at a computer all day
* Repetition - Physical effort required to sit and keyboard for long periods
* Bending, lifting - Retrieving files

**Working Conditions**

Psychological:

* Time pressures - Required to respond to internal/external requests in a timely manner