**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Donations Management Coordinator

**Job Number:** SO-207

**NOC:** 1431

**Band:** 6

**Department:** Advancement Services

**Supervisor Title:** Manager, Advancement Services

**Effective Date:** November 20, 2017

**Job Purpose**

Reporting to the Manager of Advancement Services, the Donations Management Coordinator is responsible for managing the processing and setup of all pledges, payments, gifts, securities, gifts-in-kind and funds. 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. Manages the donor filing system. Represents Advancement Services during internal and external donation related audits; requires the production and maintenance of ongoing and specific audit documentation and system’s coding. Acts as a donation’s subject matter expert during University fund allocation and review meetings. Manages any student employees reporting to the position. Produces various regular and annual reports requested by the University finance department and the Manager of Advancement Services. Produces ongoing donor and fund lists, as well as requested donation summaries, and other various progress reports.

**Key Activities**

***Donations Processing***

1. Using The Raiser’s Edge system, 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. Reconciles full gift cycle to the general ledger, banking activity, and also to online payment service providers.
3. Manages pre-authorized payment system by direct on-line link to the Bank of Montreal; 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. Creates and manages all system fund records, requiring direct communication with the University finance department to ensure two-way fund setup and general ledger synchronization.
6. Enters credit card transactions via transaction electronic terminal.
7. Edits and maintains donation and fund information as needed in online donation platforms.
8. Contributes to Development and Advancement Services plans in relation to information systems, processes and procedures pertaining to donation processing.
9. Provides professional and outstanding client-donor communication via written correspondence, phone calls, emails, and in-person; in a confidential, sensitive and secure manner.
10. Manages and maintains paper donation/donor filing systems.
11. Maintains all necessary audit and annual tax reporting documentation.
12. Prepares bank deposits.

***Report Development and Synthesis***

1. Produces and transmits all electronic and written batch and gift information to finance department.
2. Develops and produces query based reports relating to donations to provide information for any periodic internal reports.
3. Develops and produces query based reports regarding donations for annual finance department requests.
4. Develops and produces query based electronic lists of donor and fund information for annual publications; or on ad hoc basis as requested by Manager, Advancement Services.

***Administrative Support***

1. Provides administrative support to the Manager of Advancement Services.
2. Is an active member of the Advancement Systems Working Group.
3. Stays current on all CRA donation regulations and guidelines and communicates all subsequent changes to Manager, Advancement Services.
4. Prepares all necessary audit related materials and collaborates with auditors to achieve audit success; introducing new compliancy procedures as necessary.
5. Manages task assignments and assists in recruiting student employee position(s) reporting to the role.
6. Acts to request and schedule general office maintenance activities such as minor repairs, security system inquires, paper shredding contracts etc.

***Collaborate on Other Assignments***

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

**Education**

Three year University Degree or three year College Diploma

**Experience Required**

1. Minimum one year, preferably two years of experience using The Raiser’s Edge software.
2. Two years directly related experience in donations management, and one year of administrative or office experience.
3. Strong knowledge of Canadian tax laws as they relate to charitable donations.
4. Demonstrated outstanding client-service skills.
5. Demonstrated analytical skills to initiate and perform complex analyses, produce reports and organize donation information.
6. 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. Demonstrated Crystal Reports development would be an asset.
7. 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.
8. Demonstrated ability to work independently, prioritize work, and independently manage multiple, diverse and competing priorities while meeting deadlines.
9. Ability to maintain confidentiality and work with sensitive information.
10. Ability to recall, recognize and communicate interrelated information pertaining to University donations, donors and funds.
11. Flexibility to work on occasional weekends and evenings.

**Responsibility for the Work of Others**

*Indicate whether the incumbent is directly or indirectly responsible for the work of others. Provide the title of the position(s) as well as an example of how the incumbent is responsible for the work of others on a daily basis. Specifically, indicate whether the position has responsibility for hiring and supervision of student workers.*

Direct Responsibility

Student Employee(s)

**Communication**

Internal:

* Faculty/staff: to interpret fund raising procedures, discuss fund raising initiatives, explain the role of Development Office versus Finance Office; contact for various reasons when required by Vice-President, Associate Vice-President or Manager, Advancement Services.
* Financial Aid Officer: to exchange information on new funds, existing funds, etc.
* Manager of Accounting: to discuss various aspects of processes affecting both departments.
* Director - Financial Services: to explain unusual or unclear allocations; provide reports etc. for audits.
* Students: to explain job duties.
* Director, Alumni Affairs: to exchange information on donors, alumni funds, allocation process.
* Development Staff: to advise on numerous Development Office/Campaign procedures; to assist with Raiser’s Edge questions.
* Annual Fund Co-ordinator: to exchange information about Raiser’s Edge; discuss donations received.
* Manager, Advancement Services: this position is directly responsible for the Raiser’s Edge system. There is frequent contact between the Donations Coordinator and the Manager to discuss reporting requirements, request reports, technical problems, often related to the General Ledger transmissions to Colleague but also more general problems related to the day-to-day usage of Raiser’s Edge.
* AVP Development - to exchange information about allocation of funds.

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
* Canada Customs and Revenue Agency - Discuss donation policies
* 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**

Physical:

* Crowded working conditions - Shares office space - Eight month a year with a student (10 hours per week)

Psychological:

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