**University of Victoria**  
**Cupe Local 951 Position Description**

**JOB:** Clerk/PB7  
**TITLE:** Event & Gift Processing Clerk

**DEPARTMENT:** Advancement Services  
**POSITION NO:** 992108

**SUPERVISOR:** Manager Gift Processing  
**LAST UPDATED:** April 2018

**SUMMARY:** Reporting to the Manager Gift Processing, the Event & Gift Processing Clerk is responsible for accurate, compliant, and timely processing of all fundraising events and the majority of alumni events. In addition, the position will provide some gift processing and data entry functions. This position deals with confidential constituent contact and financial information and must adhere to all privacy policies.

**MAJOR RESPONSIBILITIES AND DUTIES:**

1. **Responsibility: Event Processing 70% of time spent**

   **Duties:**
   - Applies knowledge of UVic fundraising policies, gift processing procedures, CRA receipting regulations, generally accepted accounting practices and principles, and accounting and gift processing-related systems, CASL (Canada’s Anti Spam Legislation) and PCI (Payment Card Industry Compliance)
   - Processes all fundraising events and the majority if not all of the Alumni events. This includes but is not limited to the following: processing the online ticket sales through UVic’s credit card provider, splitting the ticket between advantage and donation and creating the transactions on Raisers Edge to the respective funds, linking the transactions to any existing pledges, linking or creating the individual or organization record on UVic’s CRM, linking the event attendees to the event record, checking all batches for accuracy and error control, and ensuring the transactions are correctly reflected on the corresponding event reports.
   - Serves as primary contact for External Relations and other university staff to troubleshoot event processing issues
   - Liaises with External Relations staff to ensure that split receipting rules for events are within CRA guidelines
   - Identifies, investigates and resolves event or attendee record issues, errors and anomalies
   - Assists in the testing of Alumni and Development’s event registration system forms as well as the reports produced for event management
   - Attends event meetings as required by the Manager of Gift Processing and the Director of Alumni Relations
   - Recommends procedural and technical information processing changes to increase efficiency
   - Maintains event processing documentation

2. **Responsibility: Data entry and records management 15% of time spent**

   **Duties:**
   - [List further duties related to data entry and records management]
- Maintains Constituent Records and verifies duplicates
- Scans and attaches articles, research profiles, gift agreements, donor notices, and other background information to constituent tabs
- Identifies any data issues and recommends solutions
- Receives and distributes some mail and office supplies and filing

3. **Responsibility: Gift Processing 15% of time spent**

**Duties:**
- Processes gifts with a focus on online gifts. This includes but is not limited to the following: processing the online donations through UVic’s credit card provider, creating the transactions on Raisers Edge to the respective funds, linking the transactions to any existing pledges, linking or creating the individual or organization record on UVic’s CRM, and checking all batches for accuracy and error control.
- Reprints or reissues receipts as requested by donors
- Identifies any online gift issues and recommends solution

**REQUIRED QUALIFICATIONS:**

**Skills:**
- Excellent attention to detail
- Discretion to maintain alumni and donor confidentiality
- Strong math and computer skills
- Excellent critical thinking and problem solving skills
- Demonstrated organizational skills and an ability to balance a demanding workload
- Strong interpersonal and communication skills
- Ability to build and maintain productive working relationships with all stakeholders
- Ability to work independently and collaboratively in a team environment
- Proven track record achieving goals on time and producing deliverables

**Specialized Knowledge/Education:**
- High school graduation
- Post-secondary education would be an asset
- Basic knowledge of financial accounting principles and practices and generally accepted accounting principles

**Preferred Skills/Knowledge:**
- Knowledge of gift processing procedures, UVic fundraising policies, Canada Revenue Agency (CRA) receipting regulations, Canada’s Anti-Spam Legislation (CASL) and Payment Card Industry (PCI) compliance

**Experience:**
- Experience with relational databases and information systems such as Banner, NetCommunity, Raiser’s Edge, RE NXT and MS Excel
- Experience processing large volumes of financial transactions
- Experience working in a fundraising environment, considered an asset

Equivalent combinations of training, education and experience may be considered.

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