PEA Job Description

1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>991983</th>
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<tbody>
<tr>
<td>Position Title</td>
<td>Database Coordinator</td>
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<tr>
<td>Department</td>
<td>Development</td>
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<tr>
<td>Reports to</td>
<td>Director of Fund Development</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct_____ Indirect_______</td>
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<tr>
<td>Classification Level</td>
<td>SG5</td>
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<tr>
<td>Last Updated</td>
<td>August 2018</td>
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2. Position Summary

Under the leadership of the Director of Fund Development (DOFD), the Development office works to advance the vision of the university by securing and increasing private sector funding for faculty/unit and campus initiatives by raising major and principal gifts from the university faculty and staff, and including, but not limited to, its alumni, friends and community members.

The Database Coordinator for Fund Development reports to the Director of Fund Development with a dotted line to the Manager of Planned Giving and Estate Planning.

This Coordinator provides primary advanced database support to the Director of Fund Development, the Manager of Legacy Giving and Estate Administration, and other faculty development staff ensuring the efficient operation and cohesiveness of the principal and major gift fundraising program. Responsibilities include preparing a variety of computer reports and materials, many of which are sensitive and highly confidential; interacting with development officers, deans, directors, alumni, major donors, volunteers, senior UVic executives, office administrators and students on matters relating to development; coordinating the Constituent Management Database, aka The Raiser’s Edge NXT (RE), as well as sitting on RE Design Committee.

The Database Coordinator is also responsible for coordinating RE NXT orientation and providing database training to new employees, and ongoing training to employees that includes database updates and changes in policies and procedures. The Coordinator interacts and assists with principal and major gift donors’ donations, events and meetings and also coordinates the donor pipelines. To this end, the Coordinator will be the unit’s key person for data integrity and database management issues representing the unit on database-related committees and working with the broader development team to ensure consistent business practices.

3. Key Responsibilities and Expectations

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<th>Key Responsibilities. % of time</th>
<th>Expectations:</th>
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<tr>
<td>Data Quality and Consistency 30%</td>
<td>• Actively participates in RE NXT Design Committee and acts as a consultant for Development colleagues in terms of data management and current business practices for recording development activity</td>
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- Ensures data entry, especially as it pertains to Development Officers, is consistent and accurate with policies as defined by RE NXT working group
- Provides ongoing follow-up with Development Officers in ensuring confidential and sensitive information is secure and following retention rules, adherence to the Freedom of Information and Protection of Privacy Act (FOIPPA)
- Liaises with Advancement Services in management of data quality assurance
- Liaises with Director of Fund Development and Manager of Legacy Giving and Estate Administration to develop and disseminate procedures and processes for RE NXT use
- Liaises with Advancement IT Department to ensure RE users’ needs are reflected in policies and procedures
- Recommends new processes and develops protocols for database use; updates; data entry; and ongoing management
- Assists in the implementation of new RE NXT policies and procedures
- Mentors other RE NXT users in proper data entry techniques
- Manages data input, data cleaning and other duties as required to ensure data remains at a high quality
- Manages constituent relationships, including clearances/releases in RE NXT
- Administers confidential and sensitive staff, donor, and prospective donor’s information

### RE NXT and other Database Training and Orientation 25%

- Provides initial and ongoing RE NXT orientation and training sessions for Development Officers, managers and occasionally directors, including: proper database usage, policies and procedures, how to enter and analyze data/metrics, filter reports and produce lists such as mailing and event lists.
- Provides initial and system upgrade training to Fund Development staff on the following university systems: RE NXT, Connect and Net Community
- Creates, updates and maintains training documentation for the fundraisers with regards to RE NXT database system and recording of activity on RE NXT and use of Connect
- Is the key contact person for RE NXT users by fielding questions and providing support related to Fund Development
- Communicates with staff, faculty and community members in a way that ensures the sensitive nature of the information the Development Office holds (information on prospects: health, wealth, politics, issues with gift acceptances)
- Fields questions from parts of the university related to development

### Fundraising Support and Reporting 15%

- Builds custom data collection forms as needed
- Pulls accurate information for Work Plan and Priority setting needs
- Filters RE NXT reports found on Connect, sorting data as requested
- Compiles materials for RE NXT for inclusion on Connect and orientation manuals
- Updates RE NXT with fundraising activity, and creates and maintains proposals in RE NXT for the Director of Fund Development
- Creates custom queries and other reports as needed from RE NXT
- Assists with financial reporting, which help set fundraising goals
- Provides support for projects as required

**Legacy Giving Support 20%**

- Deceased Constituent Administration:
  - Reviews local and provincial obituaries on a daily basis to ensure accuracy of RE NXT database
  - Updates records of deceased individuals in database in accordance with unit's procedural documents and reports pertinent deaths to specific Development colleagues and/or the University Secretary's office
  - Provides weekly reports of deceased constituents to specific UVic departments

- Records Management:
  - Creates and maintains accurate and up-to-date Expectancy and Estate proposals in RE NXT in accordance with unit's procedural documentation and enters other data in RE NXT as needed

**Pipeline Coordination 10%**

- Prepares and assists with pulling pipelines for 10 faculties and 2 units
- Creates and updates pipeline procedure documentation
- Trains development staff on pipeline procedures
- Filters monthly pipeline reports as requested
- Ensures the donor and donor prospects information is current and accurate
- Manages fundraiser's pipeline reports, ensuring data quality and consistency
- Analyses pipeline reports, ensuring donor segmentation is maintained and data is updated regularly

### 4. Classification Factors:

**Problem-Solving:**
This position should be able to provide analysis of varying technology/fundraising problems and exercise judgement to identify solutions not always easily found. Provide solutions for Director of Development and others, with investigation sometimes required to modify methods and procedures.

**Responsibility for Financial & Material resources:**
This position will have shared responsibility for related data and systems, supporting financial reporting and contributing to fundraising goals.

**Responsibility for Human Resources:**
This position advises staff providing information, direction and guidance on projects in day-to-day fundraising work (use of data and applications) including training, and supervision of team employees as required.

**Impact of Decisions and Actions:**
This position will be involved in collaborative decision making and goal setting, and use of data/applications that have a major impact on the results on specific projects and services within the department and beyond into the faculties, and the university as a whole.

**Independence:**
This position works in accordance within the framework of policies and procedures set by Alumni & Development but has considerable latitude in selecting work methods. Objectives will be set with managers/director and based on the needs of service users. Work is reviewed on completion of projects or phases and informed guidance is available.

5. **Summary of qualifications:**

This position requires an undergraduate degree plus a minimum of 3 years of experience in:
- Advancement Services and/or Alumni and Development environments
- Use of RE and related Blackbaud tools

An equivalent combination of education and experience may be considered.

Knowledge requirements include:
- Expert knowledge of Blackbaud’s Raiser’s Edge NXT and Net Community
- Expert knowledge of Microsoft Excel
- Knowledge of the regulations, procedures, policies of the University the Office of the Vice-President External Relations and the Associate Vice-President Alumni and Development, the Association of Fundraising Professionals, the Canadian Association of Gift Planners, the Canada Revenue Agency, the Council for Advancement and Support of Education
- Familiarity with prospect research
- Project Management skills

Competency requirements include:
- Excellent organizational skills including attention to detail, time management, and ability to multi-task in a fast-paced environment.
- Experience in effectively maintaining the confidentiality of highly personal and sensitive information.
- Strong communication and interpersonal skills with demonstrated ability to relate well and work effectively within a team environment, as well as the larger UVic community, external agencies and donors.
- Strong writing and editing skills.
- Ability to work independently with limited supervision and resolve tasks and/or problems by exercising judgement and innovation, and employing critical thinking and/or analysis.
- Ability to prioritize a large workload and deal with frequent interruptions.
- Possesses a strong sense of urgency and follow-through
- Ability to work under pressure and meet strict and often emergent deadlines

Assets or Preferences:
- Experience gained in a post-secondary environment
- Experience gained in a fundraising environment
- Knowledge of Adobe InDesign and Photo Shop preferred

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<th>Employee's Signature:</th>
<th>Date:</th>
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<thead>
<tr>
<th>Manager's/Supervisor’s Signature</th>
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