UNIVERSITY OF VICTORIA
CUPE LOCAL 951 POSITION DESCRIPTION

JOB: Secretary/PB8
TITLE: Alumni Relations Assistant

DEPARTMENT: Alumni Relations
POSITION NO: 997543

SUPERVISOR: Director, Alumni Relations
LAST UPDATED: February 2016

SUMMARY:
Reporting to the Director, Alumni Relations, the Alumni Relations Assistant provides exemplary customer service while performing a wide variety of event planning, financial and general administrative duties in support of the Alumni Relations department, the UVic Alumni Association and Annual Giving.

The Alumni Relations Assistant provides administrative support to for the planning and implementation of a high volume of events including management of the rsvp list, ticketing, and arrangement for promotional material and signage. In this capacity the incumbent is responsible for running reports and queries in Raiser's Edge, creating email merges, sending mass emails, as well as creating and processing online event registrations using NetCommunity software.

Additionally this position is responsible for providing financial assistance such as: reconciliations of financial accounts in the FAST financial system; reconciliations of bank transactions for the Alumni Relations and Alumni Association including multi-account reconciliations with internal and external merchants; completing accounts receivable and payable, petty cash, and other related financial duties; development of spreadsheets for financial monitoring and reporting; and, assisting with year-end and other accounting procedures.

This position also provides frontline service include responding to phone, email and in person inquiries, and providing information to various stakeholders and the university community, including alumni. The Alumni Relations Assistant provides back up the Assistant to the Director when necessary.

MAJOR RESPONSIBILITIES AND DUTIES:

1. Responsibility: Event/Data Management & Support – 45%

   Duties:
   • Manages department calendar of events, email scheduling and alumni/donor correspondence.
   • Completes third party requests for information and access (including on campus faculty and department requests).
   • Ensures adherence to all CASL regulations, and both internal and external privacy compliance regulations relating to the contact with, and distribution of, vital information about all UVic alumni, donors and friends.
   • Runs database reports and queries, creates mail merges, and facilitates department requests for
• Sends mass emails and creates and processes online event registrations. This may include some creative
design (approximately 60 events a year).
• Shares responsibility for creation and management of registration pages for alumni events, as well as
supports and proofs all faculty led event registrations.
• Processes all registrations for events.
• Performs post event data clean up.
• Responsible for program event logistics (RSVP lists, ticketing and ticket costs, name tags, promotional
materials and signage).
• Works closely with Development data support team to facilitate regular data cleanup.

2. Responsibility: Financial Assistance – 40%

Duties:
• Performs monthly reconciliations of all transactions, identifying and investigating discrepancies and
anomalies and taking immediate action to correct errors.
• Prepares payment for invoices, purchase orders, travel claims, reimbursement claims and professional
development claims for entire department.
• Completes web requisitions, business firm retainer forms, journal vouchers, payroll timesheets, salary
reallocations, and pre-event authorization forms.
• Prepares and issues invoices and receipts for payments, sponsorships and gifts in kind.
• As custodian of cheques, and cash received, ensures funds are securely stored in a locked location until
deposited, and promptly deposits all monetary funds and prepares appropriate accounting
documentation.
• Monitors petty cash supplies, receipts and arranges reimbursement/replenishment.
• Liaises with Accounting Services on all departmental forms, requests, or issues to ensure prompt
resolution.
• Investigates and responds to inquiries from Accounting Services, Purchasing Services Advancement
Services, Payroll, and other departments on campus.
• Assists Director of Alumni Relations with the preparation of departmental budget and prepares monthly
reports for the Director and the Alumni Association board of directors executive committee.
• Prepares preliminary budgets for Alumni staff, programs, events and projects for further discussion and
final approval, and reviews all department budgets to ensure consistency and accuracy.
• Prepares all year end documentation for the Alumni Association and liaises with external accountant to
facilitate clear, concise and accurate financial statements for the year.
• Prepares fiscal report for Board of Directors and Treasurer for all board meetings and AGM.
• Contributes to the development of strong financial and operational procedures that align with
departmental and university policies and accepted accounting practices.
• Provides Alumni Relations and Annual Giving staff with guidance on Accounting and Purchasing guidelines
for reimbursements, travel, conferences, and hospitality. Assists them with the completion of accounting
and pro-d forms.
• Creates, monitors and processes all Alumni events tickets, including, accurate GST reporting and
accounting for all ticketing and completion of daily cash reports.
• Prepares Torch magazine RFQs, BFRs, JVs, WebReqs and freelance contributor payments and contracts.


Duties:
• Provides front line support for all alumni inquiries to ensure accurate and timely response and
assistance, including answering the department phone and responding to email and online forms.
• Makes address database updates received by phone and email.
• Orders and monitors supplies for office, events etc. for alumni and development teams.
• Completes new staff onboarding: incumbent is department representative for RE/NetCommunity training program. This includes periodic review and updates to training documentation and program used throughout external relations.
• Provides front line support for Alumni Annual Giving Officers through training, event and general administrative support as well as acts as first point of contact for all administrative and procedural questions.
• The Alumni Relations Assistant will back up the Assistant to the Director when necessary.

REQUIRED QUALIFICATIONS:

Skills:
• Excellent communication skills, both written and verbal.
• Strong interpersonal skills with demonstrated ability to relate well and work effectively within a team environment, as well as with the larger UVic community and external agencies.
• Ability to exercise initiative, independent judgment, tact, diplomacy and cultural sensitivity.
• Self-motivated with an ability to work effectively under pressure with minimal supervision.
• Strong organizational skills and an ability to manage multiple conflicting priorities and consistently meet deadlines.
• Strong problem-solving, analytical and investigative skills.
• Consistent accuracy & attention to detail.
• Proficient in researching new information.
• Creativity, imagination and enthusiasm in meeting challenges.
• Ability to take initiative and improve processes where possible.
• Ability to learn and apply new software to improve efficiency and effectiveness of existing business processes.

Specialized Knowledge/Education:
• Financial and bookkeeping practices.
• Administrative office practices.
• Event administrative practices.
• Manipulation and extraction of data from large, complex administrative databases (e.g. Raisers Edge).
• Accounting or enterprise-wide administrative and financial software systems (e.g. FAST).
• Facilitating email communication using NetCommunity or other similar software.
• Microsoft Office (Word, Excel, Access, Outlook, PowerPoint, Publisher, etc.).
• Web tools such as (MS Office Access and Publisher), Cascade (website maintenance), Adobe Photoshop/InDesign, Camtasia, USource, social media (Facebook and Instagram), SharePoint.
• Post-secondary bookkeeping or other related education is preferred.

Experience:
Must have a minimum of three (3) years of recent experience in a similar position, preferably in a post-secondary or institutional environment.

Related work experience should include:
• Financial and bookkeeping duties including complex General Ledger and bank reconciliations, and composing and analysing budgets.
• Senior administrative office duties including providing first-point-of contact support and customer service.
• Special event administration and support.
- Training others in financial work practices.
- Interpreting and/or applying policy and procedures.
- Providing exemplary customer service.

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