UNIVERSITY OF VICTORIA
CUPE LOCAL 951 POSITION DESCRIPTION

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<tr>
<th>JOB:</th>
<th>TITLE:</th>
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<tr>
<td>Secretary/PB8</td>
<td>Alumni Relations Assistant</td>
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<tr>
<th>DEPARTMENT:</th>
<th>POSITION NO:</th>
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<tr>
<td>Alumni Relations</td>
<td>997543</td>
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<tr>
<th>SUPERVISOR:</th>
<th>LAST UPDATED:</th>
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<tr>
<td>Director, Alumni Relations</td>
<td>July 2019</td>
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SUMMARY:

Reporting to the Assistant 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.

This position is responsible for providing financial assistance such as: reconciliations of financial accounts in the FAST financial system; reconciliations of bank transactions for Alumni Relations and the 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: Financial Assistance – 50%

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.
• Owner of department petty cash fund. Documents records for petty cash and receipts. Arranges for reimbursement/replenishment of petty cash.
• 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 and executive committees.
• 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 YTD reports for UVAA 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.
• Serves as Office C-Card Manager with access to all staff c card accounts. Assists with training staff on c card submission. Ensures all c card statements are submitted by staff on a timely basis monthly.
• Prepares Torch magazine RFQs, BFRs, JVs, WebReqs and freelance contributor payments and contracts.

3. Responsibility: Alumni Relations Administrative Support – 50%

Duties:
• Situated in the front office for Alumni and Development, the coordinator will greet visitors for all departments including donors, alumni and interviewees.
• Provides front line support for all alumni inquiries to ensure accurate and timely response and assistance, including answering the department phone and responding or vetting all general email and online forms.
• Handles multiple Outlook email accounts and calendars. (Emails include alumni@uvic.ca, alumasst@uvic.ca, torch@uvic.ca )
• Makes address database updates received by phone and email.
• Orders and monitors supplies for office, events etc. for alumni and development teams.
• Provides front line support for Alumni Annual Giving Officers for event and general administrative support as well as acts as first point of contact for all administrative and procedural questions.
• Assists with onboarding/offboarding of staff. Specific responsibility for signing in and out all keys, phones, c cards, RE access and FAST access. (Up to date list located in the training binder.) Utilizes the onboarding and offboarding form to document actions.
• Assist with set up of Skype and any other technical needs for A&D staff in the building; including using Outlook to sign in/out laptops.
• Keys in FMIS requests as required and organizes supplies as needed.
• Assists in scheduling department meetings. Records and distributes minutes at department meetings (when required)
• Responsible for timely and accurate submission of applications for work study and co-op students, as well as the time sheets associated with the temporary staff.
• Helps organize staff gifts for the A&D area and collects money for department events. (signing of cards and collecting money for staff gifts and events)
• Maintains and updates training manual for office processes.
• Assists Advancement Services with Processing registrations for events (paid and unpaid) when additional capacity is needed.
• Assists with program support as needed such as administrative duties for online networking “Alumni Connect”. Tasks include accessing Banner for student records and approving membership requests.
• Assists Alumni Relations Coordinator with post event data clean up as needed.
• Assist with program event logistics (RSVP lists, ticketing, name tags, promotional materials and signage) when needed.
• The Alumni Relations Assistant will back up the Assistant to the Director when necessary.
• The Alumni Relations Assistant will be required to work at select events that occur after normal work hours.

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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<td>Supervisor’s Signature:</td>
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