University of Victoria  
Cupe Local 951 Position Description

JOB: Clerk/PB10  
TITLE: Gift Processing Coordinator/PB10

DEPARTMENT: Advancement Services  
POSITION NO: 995630, 992477

SUPERVISOR: Manager Gift Processing  
LAST UPDATED: August 2016

SUMMARY: Reporting to the Manager Gift Processing the Gift Processing Coordinator is one of two positions responsible for coordinating gift processing of one-off, donations, pledges and recurring gifts, online and donations, employee payroll donations and event proceeds. This position ensures the accuracy, compliance, timeliness of data processing and payment, reporting and receipting of donations, pledges, gifts, donations and event proceeds. This position plays a critical role in records management through daily processing activities and audit and reporting responsibilities. The Gift Processing Coordinator supervises a work study students on an ongoing basis.

MAJOR RESPONSIBILITES AND DUTIES:

1. Responsibility: Coordinate Gift Processing  65% 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)
- Serves as primary contact to troubleshoot issues and receive inquiries from external relations staff, university staff (e.g. payroll, faculty) and donors of the Annual Program
- Acts a resource to donors, external relations and university staff, CUPE 951, Work Study and Casual staff within unit
- Liaises with external relations, student awards and financial aid, payroll and faculty staff and donors in the coordination of online gift and employee donation programs
- On behalf of donors, investigates fund options to identify and/or make recommendations to donors; liaises with faculty alumni officers where no matching fund exists to explore donor options, or explore the potential of establishing a new fund
- Identifies, investigates and resolves donor record and fund related issues, errors and anomalies including establishing, updating and correcting donor records and establishing new donor funds
- Reviews donor records prior to processing to identify and correct data errors and anomalies
- Schedules and processes donations, reconciling account balances and investigating and correcting errors through journal adjustments
- Recommends procedural and technical information processing changes to increase efficiency
2. **Responsibility:** Audit and Reporting 15% of time spent

**Duties:**
- Tracks pledge periods for employee donation program for reporting purposes
- Prepares routine and ad hoc reports for external relations staff and donors
- Runs and audits monthly reports correcting errors identified during auditing process ensuring an error free records for yearly external and internal audits

3. **Responsibility:** Human Resources 15% of time spent

**Duties:**
- Prepares applications for Work Study students for the Gift Processing department
- Provides ongoing formal supervision to Work Study students and Casual employees
- Completes Advice of Separation documents for Work Study students and Casual employees
- Tracks and submits Work Study students and Casual employees work hours for review by Manager Gift Processing
- Provides feedback on Work Study student and Casual employee performance to the Manager Gift Processing
- Provides periodic guidance and direction to CUPE 951 Data Processing & Tracing Clerk
- Recommends changes in staffing practices and procedures contributing to unit personnel policies

4. **Responsibility:** Other General Duties 5% of time spent

**Duties:**
- Processes honorarium payments and provide receipts for honorariums donated back to UVic as per CRA guidelines
- Clarifies donor solicitor relationships with external relations staff when unclear and updates donor records accordingly
- Participate in Committees as requested e.g. Occupational Health and Safety Committee, Database Design Committee
- Provides project support when required

**REQUIRED QUALIFICATIONS:**

**Skills:**
- Strong interpersonal and communication skills
- Discretion to maintain alumni and donor confidentiality
- Strong math skills
- Excellent attention to detail
- Excellent critical thinking and problem solving 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
- Ability to work effectively with all levels of university personnel
- Demonstrated organizational skills and an ability to balance a demanding workload
- Demonstrated leadership and supervisory skills

**Specialized Knowledge/Education:**
High school graduation
In-depth knowledge and understanding of:
- Gift Processing procedures, UVic fundraising policies and CCRA receipting regulations, CASL and PCI;
- Financial accounting principles and practices and generally accepted accounting principles;
- Relational databases and financial information systems

**Experience:**
A minimum of three years of gift processing experience is required. Equivalent combinations of training, education and experience may be considered. The following are considered assets: experience working in a fundraising or accounting environment; and, supervisory experience.

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