

Director, Gift & Donor Records

Reports to Senior Director, User Services

**Position Summary:** Responsible for directing and coordinating the maintenance of gift and biographic records, communicating with customers regarding gift transactions, and complying with appropriate Advancement, University, and regulatory policies.

**Specific Responsibilities:**

- Responsible for directing and coordinating the maintenance of gift and biographic records involving the receipting, processing and documentation of private gifts and grants to the University and its affiliates. Oversee data quality and manage customer service related to charitable contributions. Direct the receiving, accurate and timely deposit, processing, and receipting for major private gifts and grants to the University and its affiliates. Manage and advise on the reporting of University Advancement gift activity.
- With an understanding of accounting principals, CASE and IRS guidelines, and Advancement policies, work with the Director, Quality Control to design and implement Advancement-wide guidelines and standards for data maintenance of constituent data in OASIS.
- Provide consultation and expertise to the Senior Director, User Services in matters pertaining to the information needs and objectives of the university's advancement community.
- Communicate directly with donors, financial advisors/representatives, and university staff regarding gift transactions and the delivery of assets to the university. Authorize transfer of funds across university accounts. Serve as resource for university advancement and financial officers regarding gift counting and reporting policies and procedures and data administration. Conduct staff development and training sessions as needed, including preparing and presenting information on policies and processes.
- Ensure adherence to the University gift counting and reporting policies and procedures. Ensure regulatory compliance with charitable gift account policies and reporting standards as outlined by CASE, NACUBO, FASB and IRS. Monitor and understand the IRS regulations as they pertain to gift acceptance, processing, and receipting.
- Maintain awareness of issues within the advancement profession, and of the goals and activities of the University and its peer institutions. Pursue

ongoing professional development through participation in meetings, conferences, and related training opportunities offered by vendors, the University, and professional organizations.

- Run OASIS and FRS reports. Use spreadsheets and databases to collect and record data and information for departmental reports. Collect, analyze, and present as appropriate.
- Manage personnel responsibilities including counseling, disciplining, hiring/dismissing, and training for new staff positions. Schedule and approve overtime, sick leave, vacations, and other time off with pay. Complete employee performance appraisals. Make recommendations to staff on classes for professional development.
- Other duties as assigned.

#### Qualifications:

- Minimum bachelor's degree in accounting or finance, master's degree preferred, and at least five years of experience in Advancement Services.
- Necessary strengths include organizational, analytical, financial, and problem solving abilities. Outstanding leadership, customer service, and interpersonal skills are also required, in addition to strong verbal and writing skills. Ability to manage multiple projects and staff simultaneously.
- Must be able to develop solid relationships with advancement staff, administrators, and financial officers.
- Requires knowledge of national and institutional professional fundraising methods and advancement services practices and standards.
- Knowledgeable in the use of various software applications, including spreadsheet, word processing, relational database, and presentation software.
- Knowledge of SQL and ability to write queries and work with technical colleagues on determining which database fields to use for reports.
- Scrupulous accuracy and attention to detail, as well as the ability to exercise sound independent judgment and follow established protocols and procedures.