

JOB DESCRIPTION

Position Title: Director of Gift Accounting

Department: ADIS

Job Code:

Effective Date: Mon, dd yyyy

Reports To: Director of Development Services

Shifts:

POSITION SUMMARY:

Directs all activities of the Gift Accounting Department to include formulating and implementing policies and procedures for the successful recording, maintenance, receipting, documenting and collection of private gifts and grants to the University and its schools and colleges. Oversees gift record data quality and manages customer service related to the University's charitable contributions. Manages and advises on the reporting of charitable gift activity. Develops and leads a current staff of four.

MINIMUM QUALIFICATIONS:

- Bachelor's degree from a four-year, accredited university or college, preferably in Business or Accounting.
- 5 plus years of related experience required; experience in higher education or other non-profit preferred.
- Excellent oral and written communication skills; the ability to interact courteously and effectively with internal and external contacts at all levels
- Excellent managerial skills, to include the ability to coach subordinates and foster professional growth.
- Excellent organizational skills and the ability to prioritize work to meet defined goals and objectives

KEY RESPONSIBILITIES:

1. Gift Administration 30%

Directs the receipt and accurate and timely deposit, processing, and preparation of official documentation for all private gifts and grants to the University.

- Manages all aspects of gift accounting for the University, its schools and colleges. Ensure detailed accounting of such in the alumni/development database. Authorizes the transfer of funds across University accounts. Informs appropriate administrators, faculty, and staff of asset transfers.
- Serves as a resource and primary liaison to various constituency groups served by Gift Accounting on matters of gift accounting and reporting policies and procedures, data administration and database gift record management. Communicates directly with accounting/business officers, development directors, major gift officers, administrators, deans and department heads, grants and contracts, internal audit, payroll, and other

departments as needed. Provides advice and assistance to the various departments on gift handling practices, gift acceptance policies, and reconciliation of gift revenue.

- Oversees the production and distribution of detailed and summary gift reports with business, development, and academic offices. Verifies gift/pledge reports, and develops and presents reports on a regular basis for campaign and cash receipt totals. Prepares monthly cash receipt reports, and regularly meets with development leadership to review and provide analysis of the data.
- Administers corporate matching gift program. Ensure that matching gift forms are filled out accurately, processed promptly, and recorded appropriately. Monitors changes in corporate matching gift policies and records on system accordingly to ensure compliance.

2. Departmental Operations – 30%

Directs the Gift Accounting Department to provide maximum customer service to donors, staff, faculty, and administration with minimal complaints. Judgment is exercised in administering daily operations and in evaluating the efficiency and utility of procedures and personnel.

- Assigns and delegates responsibility for work deadlines, disseminates policies to staff, and sets deadlines.
- Monitors new commitments, status of work in progress, and department and interdepartmental problems encountered.
- Performs strategic and tactical planning for the department.
- Evaluates and implements opportunities to extend services by applying technology solutions to gift administration and processing.
- Interviews, hires, trains, and directs gift accounting staff. Staff must be trained extensively on internal gift accounting practices, policies, and procedures, and have a thorough understanding of the alumni/development computer database (Millennium) and external guidelines (CASE, NACUBO, FASB, IRS, etc.) that govern the recording, receipting, and reporting of gifts. Staff will be expected to accurately determine the designation of gifts based on the donor's stated intent and accurately record information on the database. Staff will be required to make decisions about identifying the proper records, creating new and linked records, and interpreting the donor's intent based on the documentation received.

3. Quality Control and Customer Service – 30%

Ensures integrity of gift records, responds to specific donor/departmental/administrative requests where necessary, ensures the University's compliance with IRS regulations regarding the processing and receipting of charitable gifts, and maintains effective customer service policies and procedures.

- Meets with, corresponds, or telephones donors, their advisors or representatives, staff, faculty, and administrators regarding gift transactions and the delivery of assets to the University.
- Oversees data quality and transaction accuracy and manages customer service related to the University's charitable contributions. Manages and advises on the reporting of charitable giving activity.

