



**Program Manager, Gift & Donor Records
Advancement Services**

Functional Title: Team Leader, Gift & Donor Records

Reports to: Director, Gift & Donor Records

Pay Grade: 53

Overview:

The Team Leader is responsible for expediting the workflow of Gift & Donor Information Analysts and problem resolution. Responsible for managing gift and biographic projects and recurring complex gift processes. Responsible for reviewing gift entry of others prior to posting into OASIS database. Interprets requests and executes appropriate next steps, working with University and Advancement colleagues and donors.

Principal Responsibilities:

- 20% Manage with accurate analysis, OASIS entry, and follow-up of all gifts and pledges, with a focus on high-end (\$1,000+) and complex transactions (payroll deduction, stock, grant, major donor, credit card batching, gift data loaders, modifications, etc.), within timeframe identified in department standards, utilizing an advanced understanding of Advancement policies and accounting principles and concepts. Process gifts, pledges, modifications as volume dictates.
- 15% Manage project request database by reviewing and assessing incoming project requests and distributing assignments as needed for staff completion. Follow-up with requestors to verify satisfaction with work completed, through conversations and surveys. Verbally and through email communicate feedback to GDR staff as appropriate and re-train as needed, when issues indicate that mistakes were made due to lack of understanding.
- 15% Manage personnel responsibilities for Information Analysts including counseling, disciplining, hiring/dismissing, and training for new staff positions. Complete

employee performance appraisals. Make recommendations to staff on classes for professional development

- 5% Request establishment or deactivation of accounts for contributions from Finance, and create and maintain corresponding allocations in OASIS by updating the allocation details. Work with Advancement and Finance colleagues to communicate impact of account and allocation changes on GDR workflow and Advancement reports.
- 10% Manage the pledge reminder process to assure the collection of funds expected by the university by communicating with Advancement colleagues to confirm the accuracy of reminders and which should be sent, updating information in OASIS appropriately based on their feedback, running reports out of OASIS, merging details into reminder format, and sending reminders to Mail Services for mailing.
- 15% Manage gift entry work of colleagues in Gift & Donor Records to verify accuracy prior to closing batches for posting in OASIS. Review individual transactions in database against backup documentation when appropriate, verify batch totals correspond to deposit amounts, and change status of batch to “closed” for programmatic processing.
- 5% Assist with managing daily workflow to ensure incoming work is being assigned and completed according to departmental standards through process of strategy, review and delegation. Facilitate resolution of issues by working with GDR staff, Advancement and university colleagues, and donors to identify and implement appropriate solutions
- 5% Serve as resource for University of Rochester and affiliate advancement and financial officers regarding gift counting and reporting policies and procedures and data administration. Assist in training Advancement personnel on these policies.
- 5% Ensure adherence to University of Rochester gift counting and reporting policies and procedures and regulatory compliance with charitable gift account policies and reporting standards as outlined by CASE, NACUBO, FASB and IRS by reviewing work of Analysts and Senior Analysts, communicating updates and reviewing policies at GDR staff meetings, and working with Director, Gift & Donor Records to present current and updated policies to Advancement colleagues. Attend and participate in conferences, subscribe to industry listservs, and read industry

publications (Chronicle of Philanthropy, Chronicle of Higher Education, CASE newsletters, etc.) to monitor and understand the IRS regulations as they pertain to gift acceptance, processing, and receipting.

5% Other duties as assigned.

Qualifications:

- Minimum bachelor's degree in accounting or finance, and at least three years of experience in Advancement Services.
- Requires knowledge of national and institutional professional fundraising methods and advancement services practices and standards.

Skills:

- 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 simultaneously.
- Must be able to develop solid relationships with advancement staff, administrators, and financial officers.
- Knowledgeable in the use of various software applications, including spreadsheet, word processing, relational database, and presentation software.
- Scrupulous accuracy and attention to detail, as well as the ability to exercise sound independent judgment and follow established protocols and procedures.
- Well-developed interpersonal skills including excellent oral and face-to-face communication skills, as well as the ability to consistently produce concise, professional written communications. Ability to interact effectively with all levels of staff, including executive level clients.
- Proven ability to prioritize and multi-task in a fast-paced environment; accommodate shifting priorities and meet deadlines.
- Proven ability to work independently with minimal supervision as well as be a strong cross-functional team player.

*For further information please contact Kimberley Goetz
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