

University of Rochester
Data Specialist, Gift & Donor Records
PG 9

Reports to Team Leader, Gift & Donor Records

Position Summary: With minimal direction and considerable latitude for independent judgment, performs daily gift and biographic updates to the Advancement OASIS database. Analyzes all information for input into OASIS, reviews and verifies accuracy of records, and works with university and advancement colleagues at all levels, as well as donors to ensure gift and biographic entry complies with UR, departmental, and IRS policies and regulations. A high level of skill and proficiency is required in the management of this confidential process.

Specific Responsibilities:

- 30% Accurate review, analysis, OASIS entry, and follow-up of all gifts and pledges of all levels, within timeframe identified in department standards, utilizing a basic understanding of Advancement policies and accounting principles and concepts. This process includes analyzing all gifts and pledges (15%) and accurately entering the information into OASIS (15%).

- 5% Through reading material and training sessions, learn and maintain knowledge of IRS guidelines as well as UR, Advancement, and Gift & Donor Records policies and procedures in an effort to process gifts accurately and proficiently. The analyst will be required to participate in regular training sessions to keep their knowledge current and relevant.

- 30% Accurate analysis, OASIS entry, and follow-up of all biographic updates (including those identified through daily work and those assigned to analyst as a project), within a timeframe identified in department standards, following Advancement policies. This process includes analyzing requested updates (15%) and accurately entering the information into OASIS (15%)

- 10% Review gifts and pledges requiring changes, complete basic modifications with high level of proficiency, and effectively communicate complex issues

to Senior Analysts or Director, Gift & Donor Records for handling when appropriate.

- 10% Through reading material and training sessions, learn and maintain information to clearly understand policies and procedures related to position; bring to supervisor's attention possible issues in a timely manner and participate in determining solution.

- 10% Represent the department and the university in a professional manner, protecting confidentiality of donor information at all times. Collaborate with various internal customers to understand their informational and business needs, and how the analyst's work impacts them and external customers. All work should meet timeliness and accuracy standards, as defined by department procedures, and will be monitored quarterly. Maintain an orderly work area, files, and records, including clearing desk at the end of the day, locking all confidential donor information when away from desk, and keeping records of files so work can be retrieved by supervisors as necessary. Through departmental learning materials and training sessions, proficiently learn and use OASIS and Advancement tools. Have a basic understanding of accounting principles and concepts, debits/credits, etc. Understand IRS regulations as they pertain to gift acceptance, processing, and receipting, to ensure accurate handling of gifts. Independently manage own workload and priorities, consulting supervisors and/or clientele as necessary.

- 5% Other duties as assigned.

Qualifications:

- Two years post-secondary education and 2+ years of experience in an operational environment such as Advancement Services or bank operations; or an equivalent combination of experience and education.

Skills:

- 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.

- Detail oriented with strong organizational skills and ability to problem solve.
- Advanced proficiency using the Microsoft Office suite of programs (especially Excel, Access and Word), in a networked, Windows-based environment.
- 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.
- General understanding of national and institutional professional fundraising methods and advancement services practices and standards.
- Scrupulous accuracy and attention to detail, as well as the ability to exercise sound independent judgment and follow established protocols and procedures.
- Add appropriate minimum typing speed