University of Rochester
Office of University Advancement

Advancement Systems Education and Onboarding Associate

Advancement Services

Position Overview:

The **Advancement Systems Education and Onboarding Associate** will oversee Advancement Systems Education for the Advancement systems user community. This position will report to the Director of Learning and Development, and together, they will set a vision for a best in class systems training department. This position will also play a critical role in onboarding new hires to ensure a smooth transition to the division.

Duties for the position include setting course standards, curricula design, course content development, training program evaluation, and tracking participation. The position will be responsible for developing and maintaining current documentation (online and in print) to keep current with the changing system and priorities. Multimedia content may be incorporated when necessary. The role may also assist the Director of Learning and Development with onboarding of new hires beyond the scope of Advancement Systems Education.

Responsibilities:

Instructional Design 25%

Maintain and enhance the Advancement Systems Education program to maximize the customers' understanding of systems (OASIS and OnBase), both with new employees and on-going education and performance management.

- In conjunction with supervisor, strategically plans, maintains, and enhances the curriculum, ensuring that it is in line with the division's strategic initiatives. This includes selecting appropriate training vehicles (online, classroom, or blended) for systems education. This also involves collaboration through meetings and conversations within Advancement to develop, manage and maintain training requirements; this position will also develop necessary presentations, handouts, case studies, quizzes, and course evaluation materials.
- Maintains proficiency in systems currently used by University Advancement and upcoming system changes, especially upgrades and enhancement.
- Keeps abreast of new technology and recommends innovative approaches and strategies for instruction.

Develop and Maintain Documentation 30%

Develop and update OASIS documentation.

- Write, edit and update systems documentation, including but not limited to: end-user materials, policies and procedures, online help files, report guides, and job aids. This may involve researching the topic, finding instances in current documentation and online resources where changes need to be made, taking screen shots, updating and republishing documentation and collaborating with colleagues.
- Communicate changes and distribute documentation updates to Advancement, as appropriate.

Systems Training: 20%

Deliver comprehensive, best-in-class Advancement Systems (OASIS) training.

- Lead engaging, hands-on systems training sessions for new employees.
- Lead engaging, hands-on continuous systems education to current Advancement employees.

Staff Support and Onboarding 20%

- Responsible for scheduling OASIS classes with employees (or hiring managers) and maintaining the OASIS training calendar
- Provide staff with individual OASIS assistance and offer one-on-one trainings, as necessary
- Maintain the OASIS training database by entering employee training history
- Responsible for distribution of post-training evaluations
- Responsible for OASIS access paperwork, allowing users to update their security as training is completed
- Maintains the Advancement Systems Education intranet site including OASIS documentation, training calendar, etc.
- Assist Director of Learning and Development in onboarding efforts for new hires and transfers, as needed
- Assist Director of Learning and Development in coordinating webinars, Learning Sessions and other trainings, as needed. This may include items such as preparing materials, invitations, event coordination and technology needs, and follow up evaluations.

Other duties as assigned 5%

Requirements
- Bachelor's degree

- At least two years of training, process and curriculum management, teaching, administrative oversight or related experience

- Experience in training and instructional design highly preferred (with both software training and eLearning creation)

- Two to three years of advancement experience; a general knowledge of institutional fundraising preferred

- Proficiency with Advance database preferred

- Proficiency with Microsoft Office and Adobe programs such as RoboHelp, Captivate, Flash, and Photoshop

Qualifications:
- Excellent written and oral communication skills

- Ability to translate and communicate complex functions into straightforward language

- Flexibility and able to handle multiple priorities at once and meet deadlines

- Proficient with using a wide range of hardware and software tools to develop and maintain instructional materials.

- Diplomatic, a sense of humor, a good listener, optimistic

- Strong analytical and diagnostic skills

- Exceptional customer service and interpersonal skills

- Must demonstrate the ability to think strategically, problem solve, be innovative and use sound judgment

- Highly motivated and the ability to motivate others

- The ability to work well independently

- Strong organizational skills and attention to detail