

**Program Assistant  
Gift and Donor Services  
University Advancement  
PG 51**

Reports to Director, Gift & Donor Records; Director, Quality Control; and Director, Gift Compliance and Reporting.

**General Purpose**

Independently manages and prioritizes own workload, consulting with supervisors and/or clientele as necessary. Serves as principal program assistant to two directors, and two supervisors who currently manage thirteen staff members. The multi-faceted administrative support provided by the Program Assistant, is critical to the efficient and effective functioning of the department. A high level of communication and follow-up with a variety of University personnel, in and outside of Advancement, on behalf of the Directors' and other team members is required. This position also performs cash control activities relating to contributions received throughout the Office of Advancement at the University of Rochester. Exercising a high level of confidentiality and independent judgment, continuously applies a working knowledge of internal and external standards, regulations, and applicable laws in the processing and resolution of non-routine accounting matters.

**Specific Responsibilities**

- 25% While taking security precautions and adhering to cash handling guidelines, open, review, and distribute as appropriate all incoming gift and gift-related transactions for the University and its affiliates received by Gift & Donor Records and Quality Control. Prepare gifts and pledges for deposit and into batches, per departmental procedures. Copy select checks for backup records, as defined by our policy. In an effort to meet quality control guidelines, calculates batch totals and logs each into the batch log.
  
- 25% Manage Gift & Donor Services' communications, answering and responding to inquiries from donors as well as internal staff via phone, email, and verbal requests in a timely manner, responding within 24 hours to indicate request has been received and is in progress. Manages and tracks all donor and gift file transfers to offsite vendor for storage and retrieval as needed.

- 15% Runs reports daily and merges files for the creation of donor tax receipts. Review for accuracy and manage the time critical preparation in conjunction with Mail Services for mail distribution to the donors. Also assists with generating pledge reminders, printing and reviewing for accuracy. Manages, in conjunction with Mail Services, the distribution of pledge reminders to donors in a timely manner. Also processes PCI-compliant credit card transactions as well as creates new entity records and enter biographic updates in OASIS based upon donor's request or through projects submitted to Gift and Donor Records.
- 10% Create and maintain spreadsheets, relational databases, and word processing documents to track, compile, manipulate, and format data for reporting and operational logs as needed by the three Directors. Such data will include but is not limited to individual statistics for Gift and Donor Records department staff, overall department statistics and tracking of donor requests.
- 10% Responsible for overall administrative support services in Gift and Donor Services requiring extensive experience with policies, procedures, and practices of the university, or within a specific division, or in other demonstrated and related equivalent situations. This includes general office and relative administrative services including managing calendars of the Directors, controlling access to the directors, departmental billing, ordering supplies and other similar duties as assigned. Also tracks all staff absences for department on the HRMS tracking sheet and then reviews the accuracy of all timecards, making necessary edits, and secures appropriate signatures.
- 5% Represents Gift and Donor Services 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 program assistant's work impacts them and external customers. All work should meet timeliness and accuracy standards, as defined by department procedures. 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 the supervisors as necessary. Independently manage own workload and priorities, consulting supervisors and/or clientele as necessary.

5% Through training and training materials, understand policies and procedures related to position; bring to supervisor's attention possible issues in a timely manner and participate in determining solution.

5% Other duties as assigned by Directors.

### **Qualifications**

- College graduation or an equivalent combination of experience and training is required. Coursework or related work experience should be in accounting, business, or related field. Three years of experience in Advancement Services is preferred.

### **Skills**

- Proven ability to work independently with minimal supervision as well as be a strong cross-functional team player.
- Advanced computer skills in the Microsoft Office suite of products are required as well as a general aptitude for learning new programs, including experience with databases. This position requires good judgment, self direction, discretion, a positive attitude, strong oral and written communication skills, strong customer service and problem solving skills and the ability to accommodate shifting priorities while meeting deadlines.
- General understanding of national and institutional professional fundraising methods and advancement services practices and standards preferred.