

## **University of Rochester**

### **Program Assistant**

#### **PG 51**

#### **Office of Foundation Relations**

**Reports to:** Asst. VP Foundation Relations

**Position Summary:** The Foundation Relations (FR) Program Assistant serves as the data manager for the FR office, maintaining activity, gift and payment trackers, OASIS, and Proposal to enable timely and accurate planning, tracking and reporting of activity and outcomes. Reporting to the Assistant VP for Foundation Relations, the Program Assistant maintains and updates the FR office's OASIS User Guide. The Program Assistant also covers additional FR office support functions as needed.

#### **SPECIFIC RESPONSIBILITIES:**

##### **(70%) Data Analysis and Reporting**

###### **Tracks FR activity and progress.**

- **20%** - Compiles, confirms and proactively updates key data on FR activity and outcomes via the FR Activity Tracker
- **10%** - Maintains the department's data management tools (i.e., FR Activity Tracker, Stewardship Calendar, Master Payments Due Tracker, Macros and Pivot Tables)
- **10%** - Tracks activity and progress of FR proposals and gifts (i.e., pledges, payments, gift totals, projections, etc.) using OASIS, COEUS, ORPA and the department's tracking tools.
- **10%** - Proactively explores data and offers insights and analysis. Provides relevant reports to the Asst. VP for Foundation Relations on a monthly and ad-hoc basis.
- **20%** - Support the full spectrum of the FR Top Prospect work form research and report development

##### **(25%) Pre- and post-award activities - 25%**

Update activity in FR databases and OASIS. Track and assist in follow-up on all foundation gifts. Serve as the liaison with the Gift and Donor Records staff to ensure timely and accurate input of all gift and payment activity. Serve as the liaison with the Office of Research and Project Administration and the Office of Research Accounting Standards to ensure that all University compliance and accounting requirements are met for foundation grants. Track FR payment progress, update FR databases from OASIS, ORACS, ORPA and COEUS. Run annual update of CAR reports, update and create macros. Manage all Entity and Prospect requests/updates.

**(5%) General FR Support Tasks**

Provide general office support to the FR directors as needed including phone coverage, scheduling assistance, meeting preparation, Xerox Key Op, expense/budget management, supply acquisition, and other related duties

**Qualifications:**

- Excellent quantitative analysis skills; the ability to use technology to gather, interpret, organize and present accurate data
- Advanced proficiency using the Microsoft Office suite of programs (especially Excel, Word and PowerPoint), in a networked, Windows-based environment
- Ability to think strategically and logically
- Scrupulous accuracy and attention to detail, as well as the ability to exercise sound independent judgment and follow established protocols and procedures
- Strong organization skills; ability to prioritize and work independently, handle several projects simultaneously, accommodate shifting priorities and meet deadlines
- 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.
- Strong initiative, self-motivation and the ability to work both independently and in teams

**REQUIREMENTS:**

Bachelor's degree required, with 2-3 years of development experience, or equivalent professional experience, and excellent information system, data analysis, writing, communication, customer service, and problem solving skills. Familiarity with higher education a plus.