

## **Information Analyst, Gift & Donor Records**

### **PG 51**

#### **Reports to Supervisor, Gift & Donor Records**

**Position Summary:** With minimal direction and considerable latitude for independent judgment, manage gift and biographic update process to include reviewing and analyzing all gift and biographic updates, including those of a more complex nature, to the Advancement OASIS database. Review and analyze all information for input into OASIS, reviews and verifies accuracy of records, and works with university and advancement colleagues and donors to ensure gift and biographic entry complies with policies and regulations. Responsible for reviewing gift entry of others prior to posting into OASIS database.

#### **Specific Responsibilities:**

- 30%    Execute gift and pledge process to include accurate analysis, OASIS entry, and follow-up of all gifts, memberships and pledges, with a focus on high-end (\$1,000+) and complex transactions (examples include but not limited to, stock, grant, major donor, Ruffalo NL, CMN files, modifications, etc.), within timeframe identified in department standards, utilizing an advanced understanding of Advancement policies and accounting principles and concepts. Follow up and resolve any associated problems/issues.
- 15%    Execute biographic update process to include accurate analysis, OASIS entry, and follow-up of all biographic updates (including those identified through daily work and those assigned to senior analyst as a project), with a focus on complex updates (trustee, major donor, projects requiring research and analysis, etc.), within a timeframe identified in department standards, following Advancement policies.
- 25%    Manage unique processes such as payroll deduction, pledge reminders, credit card/EFT batching, integrity check reports as assigned. Be the subject matter expert on functions as assigned. Maintain department documentation on various functions.
- 10%    Review and manage gifts and pledges requiring changes, completing any modifications identified. Complete complex modifications identified by colleagues, including larger modification projects. Maintain clear documentation for any modifications. Review and 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, document errors and provide to management, verify batch totals correspond to deposit amounts, and change status of batch to “closed” for programmatic processing.
- 5%    Through training and training material, understand policies and procedures related to position; bring to supervisor’s attention possible issues in a timely manner and participate in determining solution. Learn and maintain extensive 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 expected to read and research questions related to policies and procedures as well as participate in regular training sessions to keep their knowledge current and relevant. Respond to policy or procedure questions from less experienced GDR analysts.

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. Respond to customer (internal & external) requests. This may include managing and responding to incoming customer requests analyzing donor records to resolve issues, modifying records to correct the problem and communicating results. 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 supervisors as necessary. Independently manage own workload and priorities, consulting supervisors and/or clientele as necessary.

5% Other duties as assigned.

#### Qualifications:

- Bachelor's degree preferred as well as experience in an operational environment such as Advancement Services or bank operations or an equivalent combination of experience and education.

#### Skills:

- Ability to be flexible in a volume-driven environment. 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.
- Good understand of accounting principals
- 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.

- Typing speed of approximately 50 wpm

Signature:\_\_\_\_\_

Date:\_\_\_\_\_

Last updated: June 2016