(PD-2859) Development Records Specialist

POSITION INFORMATION

Internal Team:* SL-UD-Development Support Svcs - 204800
Job Code/Employee Classification:* Admin Support Assistant 12 Mo
Job Code: 1032

MPP Job Code:
Position Number:
Position no: SL-00002589

CSU Working Title:* Development Records Specialist
Reports To:* Exec Dir Dev Financ & Gift Adm
Campus:* San Luis Obispo
Division:* University Development
College/Program:* UD-Development Support Svcs
Department:* UD-Development Support Svcs - 204800
FLSA Status: Non-Exempt

SENSITIVE POSITION

Sensitive Position: ☑ Yes ☐ No

Job Summary/Basic Function:* Under the supervision of the Executive Director of Development Finance and Gift Administration, the Development Records Specialist is responsible for day-to-day maintenance of constituent records including biographical and gift information, and for providing other information management support services to fundraising as needed. The incumbent is expected to follow through on decisions regarding the collection and maintenance of information used by applying division, Foundation and University policies; CAE reporting guidelines; FASB/GASB rules regarding financial reporting; State and Federal regulations regarding privacy and public information issues; and IRS rules regarding charitable contributions. The Development Records Specialist has been sanctioned by the University and Foundation as a satellite cashiering function.

Minimum Qualifications:* High school diploma or its equivalent. Three years of general office support experience. (Training at a vocational school or full-time college education may be substituted for two years of the required experience on the basis of one year of college education for 6 months of experience.)
Required Qualifications:

Ability to perform detailed work with a high degree of accuracy and efficiency.

Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet, online calendaring and email.

Ability to use query software tools to extract data from computerized databases.

Ability to perform standard arithmetic functions of a transactional nature, including tracking and comparing data.

Knowledge of or the ability to quickly learn proper procedures for handling, recording, and reconciling financial data.

Ability to utilize existing resources to locate individuals and acquire current biographic/demographic information.

Excellent communication skills: ability to effectively communicate information in a clear and understandable manner, both verbally and in writing. Thorough knowledge of English grammar, spelling, and punctuation.

Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.

Ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.

Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.

Demonstrated ability to maintain a high degree of confidentiality. Knowledge of the handling of sensitive and confidential information.

Ability to coordinate and prioritize multiple tasks, set deadlines, and complete projects in a timely manner. Demonstrated time management skills. Ability to multi-task and handle a fast-paced work environment with frequent interruptions.

Knowledge of standard office practices and equipment, and ability to maintain and establish records and files.

Ability to respond to routine inquiries and explain standard policies and procedures to others.

Demonstrated competence in understanding, interpreting, and communicating procedures, policies, information, ideas, and instructions.

Ability to learn, interpret independently, and apply a variety of complex policies and procedures. Ability to identify deviations from applicable policies.

Ability to apply independent judgment, discretion, and initiative to address problems and develop practical, thorough and, at times, creative solutions as required of assignments.

Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

Preferred Qualifications:

Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

Experience with bookkeeping or cashiering functions.

Knowledge of biographical data research techniques and resources.

Knowledge of department-specific database program, Ellucian Advance.
Special Conditions:

Must be willing to travel and attend training programs off-site for occasional professional development.

Must be able to work overtime, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.

The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

Must be able to successfully pass a pre-employment background/fingerprint check.

This position classification has been defined as non-exempt and is subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

License / Certification:

Mandated Reporter:* Limited - The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

NCAA:  

Conflict of Interest:* None

Supervises Employees:*  

Job Duties
## JOB DUTIES

<table>
<thead>
<tr>
<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
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<tbody>
<tr>
<td>90</td>
<td>Serve as a gift processor for monetary gifts designated to the University, Foundation, Corporation and ASI.</td>
<td>Essential</td>
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<td>Prepare &quot;batches&quot; of gift donations of cash, checks, credit cards, pre-deposits and payroll deduction by identifying donors and interpreting their requests for gift designations, based upon information submitted with the gift, while applying applicable policies and procedures.</td>
<td>Marginal</td>
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<td>Code gifts by batches and calculate batch totals for input into the donor database.</td>
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<td>Input and verify accuracy of data, generate and edit reports, and reconcile individual gifts along with batch totals.</td>
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<td>Generate deposit reports, retrieving gifts from the department safe, stamping checks with bank endorsements where applicable, placing completed batches in safe and distributing reports to appropriate department/college fundraising staff.</td>
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<td>Verify and acknowledge receipt of items received on the Check/Cash Delivery log.</td>
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<td>Obtain credit-card approvals online and obtain PCI DSS certification; process credit-card voids and refunds online; contact donors of recurring gifts when credit-card is declined; and reconcile with gift report.</td>
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<td>Post new pledges, process all Smartcall/Phonathon pledges and payments to database, generating reports for reconciliation.</td>
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<td>Scan and log daily checks for deposit.</td>
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<td>Deliver cash deposits to the Corporation or University Cashier's.</td>
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<td>Collect and input new biographical data or modify existing biographical data in the UDAE donor database and apply applicable policies and procedures.</td>
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<td>Run Weekly Donor Reports and Scholarship Reports and email to appropriate staff.</td>
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<td>Extract online alumni information updates off the web.</td>
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<td>10</td>
<td>Perform other job-related duties and special projects as assigned.</td>
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<td>Maintain currency in the knowledge and skills necessary to facilitate industry-leading solutions Perform other job-related duties and special projects as assigned.</td>
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<td>Assist in writing and updating departmental policies and procedures.</td>
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<td>Assist and serve as backup support for mail distribution.</td>
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<td>Assist the Advancement Records Coordinator in training and assigning work to student assistants.</td>
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<td>Back up for the PolyLink/iModules email communications process for all colleges.</td>
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### USERS AND APPROVALS
