



<h1>POSITION DESCRIPTION</h1>

Department: University Advancement
Working Title: Gift Processing Coordinator
Job Code: 1035
Time Base: 1.0
Position Number: 00002225
Union / Unit (if applicable): California State University Employees Union (CSUEU) / Unit 7

Position Reports To: AVP, Advancement Services
Classification: Administrative Support Coordinator
Range Code: 2
Exempt or Non-Exempt: Non-Exempt
Last Update: 5-2-2024

PURPOSE OF POSITION:

Reporting to the AVP of Advancement Services, and receiving direction from the Gift Processing Specialist, the Gift Processing Coordinator (Coordinator) is responsible for timely and accurate processing, accounting, reporting and receipting of pledges and gifts received by the CSUSM Foundation.

MAJOR RESPONSIBILITIES:

	<u>% of Time</u>
1. Coordinate Overall Gift Management	80%
2. Administrative Support/Special Projects	20%

LIST OF TASKS FOR EACH MAJOR RESPONSIBILITY:

1. Coordinate Overall Gift Management

- a. Record and receipt contributions to the CSUSM Foundation.
- b. Create gift batches as needed and send to Gift Processing Specialist for review.
- c. Maintain gift documentation in SharePoint which contains information on University constituents and donors.
- d. Assist with researching and responding to donors' inquiries about their gifts and biographical information.
- e. Analyze source documents to determine correct information regarding memberships, gifts and donors; enter appropriate gift coding and donor data in the constituent database.
- f. Work closely with development officers, accounting and financial services office, and other university units on the processing of donations.
- g. Ensure receipting times continue to improve on an ongoing basis (ideally within a 24-hour period).
- h. Manage pledge and gift processing controls.
- i. Assist in gift reconciliation between Raiser's Edge and PeopleSoft Finance database.
- j. Assist with Alumni Database updates.
- k. Monitor the Advancement Services Help Desk daily and manage any incoming gift, or invoice notifications.
- l. Assist with global changes and updates as needed.
- m. Create weekly gift summary email for UA division.
- n. Create monthly pledge reminder report for development officers.
- o. Create online gift and pledge payment reports for Aux Accounting monthly.
- p. Create chart fields for wire transfers and stock donations for Aux Accounting as needed.
- q. Create Payroll deduction reports to send to Aux Accounting.
- r. Make gift adjustments as needed.

2. Administrative Support/Special Projects

- a. Assist the AVP of Advancement Services with the coordination and administrative support of special projects as needed.
- b. Assist with preparations for financial audits.
- c. Provide administrative support at UA events and meetings (on/off campus).
- d. Provide administrative office support for Advancement Services, picking up and distributing mail, proofing and mailing of letters.
- e. Provide outstanding customer service to both external and internal community.
- f. Provide team support to division of University Advancement.

PROVIDES LEAD DIRECTION OF OTHERS

N/A

REQUIREMENTS OF POSITION:

1. List education and experience required.

- Five years progressively responsible administrative support experience with knowledge of office methods, procedures and practices, or an equivalent combination of education and experience.
- Minimum of 2 years demonstrated experience working with Raiser's Edge or similar database.
- Familiarity with gift processing standards and processes.
- Valid California Driver's License, Class C

Preferences

- Experience in higher education or a complex non-profit organization
- Working knowledge of fundraising principles and practices

2. List knowledge, skills, and abilities required for this position.

- Thorough mastery of English grammar, punctuation and spelling.
- Expertise in using office equipment (computers, copiers, and phones) and office software packages such as, Microsoft Office (Word, Excel, and Outlook) and related computer software packages.
- Comprehensive and detailed knowledge of university infrastructure, policies, and procedures.
- Ability to effectively handle interpersonal interactions at all levels and handle highly sensitive interpersonal situations.
- Ability to effectively write and present own reports.
- Ability to coordinate multiple assignments, prioritize workload, and reschedule work assignments based on shifting priorities.
- Ability to interpret and apply policies and procedures independently, and use judgment and discretion to act when precedents do not exist.
- Ability to analyze operational and procedural problems and develop, recommend, and evaluate proposed solutions.
- Respond to routine inquiries and explain standard policies and procedures to others.
- Identify and solve standard problems where policy and procedures are referenced and refer more complex problems to appropriate staff.
- Ability to use negotiation and persuasion skills to achieve results and expedite projects.
- Perform standard arithmetic calculations of a transactional nature, including tracking and comparing data.
- Work with and maintain integrity of confidential and sensitive information and materials with tact, discretion, and diplomacy.
- Ability to draft and compose correspondence and perform complex clerical work with accuracy and speed;
- Ability to work as a team player on projects and to back up clerical support staff during peak periods or when other staff are away from office;
- Ability to establish and maintain a working relationship with others within and outside of the workgroup;
- Ability to troubleshoot most office administration problems and respond to all inquiries and requests related to the work area.
- Excellent customer service, interpersonal, written and oral communication skills
- Ability to demonstrate an awareness and appreciation of the cultural diversity of the University community, and establish and maintain cooperative and effective relations with the University employees, students and the public.

3. List machines, tools, equipment, and motor vehicles used in the performance of the duties

- Standard office equipment – computer, telephone, fax machine, copier, calculator, laser printer, inkjet color printer

4. Unique working conditions

- This office is unique on campus in that it deals with high-level dignitaries and donors to our university. This position may interact with the President's Office.

5. Other Employment Requirements

- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.

- Must participate in required campus trainings including, but not limited to, Data Security and FERPA training and CSU's Gender Equity and Title IX training.

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

Define working relationships with people on and off campus (other than supervisor or people supervised) with whom this employee interacts on a continuing basis, and how often this interaction occurs.

Donors, VIP's, Alumni and public	Provide information related to university Advancement Meetings, events, and memberships (as applicable)	Daily
Colleagues within UA	Provide analysis, information, recommendations on billing, budget and financial matters	Daily
Accounting & Procurement Office	Reconciliation and payment issues, event billing and special project funding issues and processes	Daily
Campus departments & auxiliaries	Reconciliation and payment issues, event billing and special project funding issues and processes	Daily
OHR & Payroll Services	Personnel, recruitment, and payroll issues	As needed
Campus Community	Provides general and DA-specific information as requested	As needed
President's Office	Requests for information	As needed
Chancellor's Office	Requests for information	As needed

PHYSICAL EFFORT:

Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

PHYSICAL EFFORT

Number of hours/day
N/A 1-2 3-4 5-6 7+

1. Sitting					X
2. Standing			X		
3. Walking			X		
4. Bending (neck)	X				
3. Bending (waist)	X				
6. Twisting (neck)	X				
7. Twisting (waist)	X				
8. Crawling	X				
9. Climbing	X				
10. Reaching (above shoulder)	X				
11. Reaching (below shoulder)	X				
12. Walking on uneven ground	X				
13. Crouching	X				
14. Kneeling	X				
15. Balancing	X				
16. Pushing or pulling		X			

Number of hours/day
N/A 1-2 3-4 5-6 7+

17. Fine manipulation		X			
18. Simple grasping		X			
19. Power grasping		X			
20. Lifting or carrying	X				
A. 10 lbs or less	X				
B. 11 to 25 lbs	X				
C. 26 to 50 lbs	X				
D. 51 to 75 lbs	X				
E. 76 to 100 lbs	X				
F. Over 100 lbs	X				
21. Keyboard use					X
22. Mouse use					X
23. Repetitive use of hands/arms					X
24. Repetitive use of legs/feet	X				
25. Eye/hand coordination					X

- 26. Driving cars, trucks, forklifts and other equipment
- 27. Being around scientific equipment and machinery

Yes	No
	X
	X

MENTAL EFFORT

Number of hours/day
N/A 1-2 3-4 5-6 7+

1. Directing others		X			
2. Writing			X		
3. Using math/calculations			X		
4. Talking			X		
5. Working at various tempos			X		
6. Concentrating amid distractions					X
7. Remembering names					X
8. Remembering details					X
9. Making decisions					X
10. Working rapidly					X
11. Examining/observing details					X
12. Discriminating colors	X				

ENVIRONMENTAL FACTORS

Number of hours/day
N/A 1-2 3-4 5-6 7+

1. Inside					X
2. Outside	X				
3. Humid	X				
4. Hazards	X				
5. High places	X				
6. Hot	X				
7. Cold	X				
8. Dry	X				
9. Wet	X				
10. Extreme change of temp	X				
11. Dirty/dusty	X				
12. Exposure to gas, fumes or chemicals	X				
13. Odors	X				
14. Noisy	X				
15. Working w/others			X		
16. Working around others					X
17. Working alone			X		

SIGNATURES

The last sheet for any staff position description should contain the signature sheet. Signatures will include the incumbent's signature (if applicable) or new employee; the supervisor's signature and all pertinent administrative personnel.

Employee

Print Name: _____

Signature: _____

Date: _____

Appropriate Administrator (MPP)

Print Name: _____

Signature: _____

Date: _____

Dean/Department Head/Director/AVP (optional)

Print Name: _____

Signature: _____

Date: _____