



## JOB DESCRIPTION

<b>JOB TITLE:</b> Gifts Processing and Records Specialist	<b>FLSA:</b> Non-Exempt
<b>Department:</b> Development and G.C. Foundation	<b>Date:</b> 3/21/2019
<b>Security Sensitive:</b> Yes	<b>Grade:</b> B22
<b>Reports To:</b> Director of Development and the Galveston College Foundation	

### **Job Summary:**

Under the direction of the Director of Development and the Galveston College Foundation, the Gifts Processing and Records Specialist serves as a frontline contact for alumni, donors, and other donor constituencies related to gift processing and the maintenance of gifts records. Duties include, but are not limited to, processing gifts, receiving gifts to the College and the Foundation, billing for pledges in progress, processing pledge adjustments, and performing a variety of complex duties associated with the confidential gift processing function.

### **Essential Functions:**

- Provides customer service to alumni and other donor constituencies, regarding donor designation, allocation, receipts, and recognition;
- Works with department leadership, donors, gift officers, and others to ensure compliance with IRS and College processes and procedures;
- Processes gifts in the form of cash, checks, charge cards, stock transfers, IRA transfers, royalty payments, and/or other valuables;
- Enters gifts and/or biographical data into database, reporting all gifts and pledges received, and assuring accuracy and integrity through regular audits;
- Reconciles donations received and performs timely transfers of funds to appropriate accounts.
- Identifies processing problems or deficiencies, takes corrective action and makes recommendations for changes. Researches and resolves problems related to transactions and other activities handled by the unit;
- Works with gift officers to coordinate appropriate pledge applications/designation, and assists with securing and organizing legal donor intent documents per audit requirements;
- Verifies and ensures acquisition of matching gifts. Research donor employment for matching gift eligibility; process on-line matching gift verifications from matching gift companies; notify donor or gift officer of matching gift opportunity; update and maintain matching gift information in system; process information to follow up on matching gift forms not received from donors and payments not received from matching gift companies to maximize donations. Make appropriate updates in system to employment and matching gift status;

- Administers gift acknowledgement process for donors. Coordinates with other development staff on gifts from key donors, pledges or funds, a foundation or a matching gift company;
- Creates new and maintains existing biographical records and information including addresses, business and employer information, matching gift company information, name changes and other facts pertinent to our constituents;
- Streamlines and enhances processes between Galveston College Business Services and the Development Office;
- Maintains specific modules of the donor database; manages appropriate department records in accordance with applicable policies and standards; creates regular and ad-hoc reports as requested and assists management in interpretation of reports; assists with distributing weekly reports and monthly pledge reminders; and assist with updating alumni records by correcting information on each constituent as needed;
- Complies with accounting principles and College policy, as well as all state and federal laws;
- Follows processes and procedures for compliance with Family Education Rights and Privacy Act (FERPA), National Automated Clearing House Association (NACHA), Payment Card Industry (PCI), Identity Theft procedures and college policies;
- Complies with legal and professional standards, including IRS substantiation and disclosure regulations, CASE management and reporting stands, accounting standards, matching gift program policies and giving societies and other professional and institutional standards and practices;
- Assists with data integrity and enhancement processes. Assists in conducting internal audits of data entry, gift processing, and gift classifications;
- Assists senior level staff with researching current legislation and compliance regulations on a wide variety of compliance practices as appropriate. Participates in the review of revisions to existing policies and procedures. Suggests refinements to policy and procedures to ensure compliance and efficiency;
- Researches, prepares and leads training to the college community on appropriate federal, state, local, and college compliance guidelines;
- Develops and maintains all training and internal procedure manuals for donor processing;
- Participates in testing of enhancements to Raiser's Edge and E-Tapestry modules;
- Completes special projects as assigned by the Director of Development and the Galveston College Foundation;
- Prepares and distributes regular and ad hoc reports for Foundation and College leadership on donor gifts;
- Maintains confidentiality of information exposed to in the course of business regarding students, supervisors, other employees, donors and/or potential donors;
- Contributes to a safe educational and working environment by participating in all drills and training and being prepared to take action should a health or safety emergency occur;
- Requires the kind of teamwork, supervision, and personal interaction, that cannot be had in a home office situation; therefore, regular and predictable on-site attendance is a job requirement;
- Performs other duties as assigned.

**Minimum Education, Skills, and Abilities:**

- An associate degree;
- 3-5 years of experience in accounting/bookkeeping, data entry, or advancement services required.

**Preferred Education, Skills and Abilities:**

- A 4-year college degree is highly preferred;
- Experience with a relational database (CRM), Raiser's Edge or E-Tapestry preferred.

**Work Environment:**

- Work primarily, but not exclusively, in a climate controlled environment with minimal safety/health hazard potential or work hazards. The position requires average agility and good physical condition. Ability to lift and carry moderately heavy materials weighing up to approximately 25 to 30 pounds. Work may require sitting, near vision use for reading and computer use, lifting, stooping, bending, stretching, walking, standing, pushing, pulling, reaching, and other physical exertion.

**Special Requirements:**

- Ability to meet a flexible work schedule, including some evenings and/or weekends;
- Ability to work under stress;
- Ability to travel and/or participate in meetings, conferences, and other related activities;
- Subject to a criminal background check prior to employment.

NOTE: The above statements are intended to describe the general nature and level of work being performed by the person assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties, skills and physical demands required of personnel so classified.

APPLICANT: Are you capable of performing in a reasonable manner the activities involved in the job or application for which you have applied? \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*Galveston College is an AA/EO employer and encourages applications from underrepresented groups.*