

**Saint Michael's College  
Job Description**

**Job Title:** Gift Processing and Donor Records Specialist

**Department:** Institutional Advancement

**Supervisor or Manager:** Director of Advancement Services & Prospect Research

**Date Created:** 6/5/13

**Last Revised:** 4/26/24

***Our Mission:*** It is the mission of Saint Michael's College to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

**Major Objectives:**

- Performs all gift processing activity in Institutional Advancement: responsible for entry of gifts in the College's data management system in a timely and accurate manner, maintaining gift backup and gift systems information, and producing donor communications including tax receipts
- Performs data integrity projects within Institutional Advancement to enhance donor records and improve the quality and accuracy of biographical and demographic information within our system
- Adheres to IA policies regarding confidentiality of prospect information and database integrity

**Essential Duties and Responsibilities:**

- Prepares checks, cash, credit card, electronic fund transfers, gifts-in-kind, recurring gifts, online gifts (Net Community and Give Campus), stock gifts, payroll deductions and pledges for entry in database in timely manner. Included in this is a daily/weekly/monthly auditing of the data entry of gifts and pledges for accuracy in gift allocation, following donors' instructions and checking data entry accuracy
- Manages storage of legally binding endowment and gift agreements
- Updates general contact information on Netcommunity and GiveCampus transactions as necessary during time of gift entry
- Responsible for gift maintenance and gift corrections in the database and working with Advancement Services Director to communicate and transfer that information to the general ledger and business office
- Works with Advancement Services Director to produce quarterly pledge reminders for all donors with outstanding pledge balances
- Works with Advancement Services Director and Financial Accounting Manager to set up new gift designations when needed
- Provides daily leadership giving updates to Gift Officers as needed
- Works with Advancement Services team on special data projects to ensure the accuracy and completeness of donor constituent records
- Assists in coding of new undergraduates and Masters graduates after each semester
- Codes and tracks parents of students who have withdrawn or taken a leave of absence so that the parents are not solicited.
- Adds and changes employment information on all records as needed
- Updates student and alumni activities and awards such as Block M, class officers, summer research, Women's Day profiles, career panelists
- Adds and updates other demographic information as necessary
- Assists Institutional Advancement team in special projects including (but not limited to) Annual Fund and Alumni engagement mailings
- Prepares all essential internal and external staff communications pertaining to gift entry and maintenance
- Obtains and maintains proper backup for all gifts and pledges in the college's electronic filing system – Softdocs/Etrieve
- Tracks, confirms, and follows-up on matching gifts

- Produces daily, calendar year-end, and fiscal year-end gift receipts and acknowledgement and memorial letters with accuracy
- Prepares all gifts and pledges for transmission to general ledger on a regular basis
- Reports to Business Office on the weekly and monthly transmission of gifts and pledges to general ledger
- Works with other members of the Advancement Services team on special data projects to ensure the accuracy and completion of donor constituent records
- Assists all College staff members with questions regarding gifts, pledges, funds, and special projects in a timely and courteous manner
- Assists in annual external audit with College auditors
- Maintains a secure and up-to-date environment for incoming stock, electronic funds, credit card and online gifts, and communicate with organizations involving those gifts when necessary
- Communicates with various departments such as Academics, Athletics, and Campus Ministry regarding special handling and tracking of gifts for their areas
- Sees the value of cultural, ethnic, gender, and other individual differences in people. Helps to create an environment of learning about, valuing, encouraging, and supporting differences

**Secondary Responsibilities:**

- Participates in IA events as requested, including Reunion and Family Weekend
- Picks up and distributes IA/Marketing mail

**Positions Supervised:**

- None

**Major Contacts:**

- All Institutional Advancement Staff including management team
- Various faculty and staff through campus committee assignments

**Education and Work Experience:**

- Bachelor's degree preferred but not required
- Experience in development, information/advancement services or a related field preferred, or a combination of education and experience from which comparable knowledge and skills are acquired
- Knowledge and/or experience using and managing Raiser's Edge fundraising software preferred

**Analytic Skills:**

- The ability to use various analytical techniques to identify cause-and-effect relationships and then develop plans to change a situation

**Language and Literacy Skills:**

- Reads and interprets a wide range of information. May interpret documents to others
- Regularly writes reports and correspondence. Able to shift writing style as needed for different audiences
- Regularly explains policies, listens to questions, responds, and problem solves
- Speaks to individuals and small groups effectively

**Computer/Technology Skills:**

- Proficiency with Microsoft Office Products
- Working knowledge of Adobe Products
- Experience in the following software preferred: Raiser's Edge, Softdocs, Etrieve

**Licenses, Certifications and Other Requirements:**

- Valid driver's license desired but not required. To be an eligible driver, the candidate must meet the driver's eligibility requirements as stated in the Saint Michael's College Vehicle Use Policy

**Physical Demands:**

Work is often performed in a typical office environment requiring:

- Sitting in a normal seated position for extended periods of time
- Reaching by extending hand(s) or arm(s) in any direction
- Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard
- Communication skills using the spoken word
- Vision sufficient to see within normal parameters
- Hearing sufficient to hear within normal range
- No or very limited physical effort
- No or very limited exposure to physical risk

While performing the duties of Gift Processing and Donor Records Specialist, the employee must occasionally lift and/or move up to 10 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential functions.

**Additional Requirements for the Job:**

- Capacity to deal effectively with a broad range of relationships and situations, using excellent written and oral communication
- Extremely detailed oriented possessing excellent organizational, solid administrative and managerial skills
- Ability to use independent judgment and to manage/impart confidential information
- Willingness to work the hours necessary beyond the regular schedule to complete job responsibilities, particularly during heavy volume gift processing periods – June/July, December/January.

The above job description in no way states or implies that these duties are the only duties performed by this employee. The incumbent is expected to perform other related duties necessary for the effective operation of the College.