

Employee Name:	Position Control Number: 01092179		
Department/Division: University Advancement	Classification Title: OAS, Sr		
Prepared By:	Working Title: Gift Administrator		
<input checked="" type="checkbox"/> Non-Exempt <input type="checkbox"/> Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Professional <input type="checkbox"/> Administrative <i>If Exempt, attach required documentation</i>			
<input checked="" type="checkbox"/> Unlimited <input type="checkbox"/> Seasonal <input type="checkbox"/> Temporary <input type="checkbox"/> Limited		If seasonal, list months during the season worked:	
<input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Intermittent Percent if not full-time _____ %		Date Prepared:	

This position description accurately reflects my current job.	This position description reflects the employee's current job.		
Employee Signature	Date	Supervisor Signature	Date

POSITION PURPOSE (*why position exists; how it helps accomplish mission of the department/division*)

The Gift Administrator performs analytical, reporting and administrative functions associated with the accurate and timely processing of gifts to Winona State University Foundation. Serves as the business process and application expert for the time-sensitive and highly confidential gift administration of contributions to the Winona State University Foundation, with the goal of minimizing risk and maximizing philanthropic investment. Serves as a resource and advisor to fundraisers, staff and faculty to ensure our solicitation messaging adheres to donation collection standards and reports are developed with accurate gift and donor criteria. Provides database management support for the Management Analyst 2 position. Manages the Matching Gift Program which maximizes personal charitable contributions through employer matching gifts.

RESPONSIBILITIES AND RESULTS

1. Administer the time-sensitive and confidential process of receiving, analyzing, allocating, entering and receipting all charitable donations and pledges to the Winona State University Foundation on a sophisticated relational database (Raiser's Edge). Maintain the confidentiality of donor and prospect data.

- Interpret and apply IRS, CASE (Council for Advancement and Support of Education), and WSU Regulation 6-1 (Gift Processing and Scholarship Procedure) guidelines to analyze, classify and record charitable contributions to WSU Foundation (WSUF).
- Determine the appropriate gift classification and allocation for all donations by analyzing the Raiser's Edge database (fund records, contact reports, transaction records); researching donor documentation, donation pages, websites, and other printed and electronic solicitation messaging; consultation with development staff and other members of the campus community.
- Determine appropriate credit is given to all associated donors, in alignment with the gift documentation provided, and in compliance with IRS regulations, CASE guidelines and department policies.
- Coordinate with Director of University Advancement Finance, Annual Fund Director, and development staff to establish and implement industry standards for the development of new Campaign records, Appeals records, Funds records and package benefits.
- Manage online and electronic third-party donations platforms to retrieve donation data. The number of companies using EFTs for donations and matches is increasing exponentially.
 - Review, analyze and import information from all online and electronic donation streams (i.e. Blackbaud Merchant Services, Net Community, GiveCampus, SWIFT, CyberGrants, Benevity, EasyMatch, DonateWell,

- YourCause, Network for Good, Amazon, Facebook and third party matching gift agencies, etc.)
- Develop and edit import donation templates using an outside application (i.e., ImportOmatic)
- Determine, document and utilize the unique credentials, data retrieval methods, websites, and tax receipting requirements for each online donation stream.
- Manage the unique requirements of **specialized gift types** which includes but is not limited to:
 - **WSU Payroll Deductions** – Create, amend and maintain records of charitable donations through WSU payroll deduction installment pledges. Analyze and reconcile payroll deduction reports against database transactions for errors in starting, adjusting, or stopping deductions in a timely manner. Communicate and collaborate with WSU Payroll Office and donors to clarify requests and resolve issues.
 - **Corporate Matching Gifts** - Create new Matching Gift company Raiser's Edge records, update biographical data and manage records. Research and understand each company's unique regulations regarding matching donations limits, qualifications and exclusions. Prepare gift verification with supporting documentation.
 - **Letters of Intent** (multi-year pledges) – Coordinate with Directors of Development and the Donor Relations Lead to ensure accurate installment and reminder schedules. Process and record documentation.
 - **Stock Transfers** – Coordinate, document and receipt the stock transfer between the donor, broker, fundraiser, and the bank trust officer. Communicate with development staff to ensure timely acknowledgement of the gift.
 - **Gifts-in-Kind** – Provide and document specialized receipting and data entry as per IRS guidelines. Coordinate with Development colleagues to obtain details and acknowledgement letters.
 - **Gift Annuities & Donor Advised Funds** – Use IRS guidelines to identify the donor, the soft credit recipient, and apply appropriate tax receipting and acknowledgements.
 - **Memorial and Honor Tributes** – Collaborate with the Donor Relations Lead to capture the donor's intent and ensure notification is sent to the honoree or their family. Establish tribute and memorial attributes and relationships.
 - **Estate Trust Gifts** – Establish record data and capture trust documentation for tracking donor's bequest to WSU to ensure ongoing recognition of the donor's generosity and appropriate gift crediting.
 - Manage the unique requirements of **specialized programs** which include, but are not limited to:
 - **Warrior Club** – Provide membership donation reports with details including benefit levels and team affiliations. Provide input and recommendations on membership solicitations to ensure consistency and accuracy of donation options.
 - **Players Associations** – Collaborate with affiliate groups to determine types of memberships, fees, benefits, reporting, receipting and additional data collection preferences.
- Create, edit, maintain and deactivate Constituent, Gift, Fund, Appeal and Campaign records.
- Design, populate and commit imports for cash and check gifts, recurring credit card charges, recurring EFTs, pledge transactions and other special gift types, to reconcile totals.
- Audit gifts to ensure they have been properly deposited to the WSUF in compliance with donor documentation, IRS regulations and department policies.
- Create new agency and scholarship funds within Raiser's Edge and Financial Edge adhering to standardized accounting practices. Database currently contains over 1,250 agency and scholarship funds.
- Review, design and update printed and electronic receipt templates.
- Generate, audit, customize and mail gift receipts.
- Monitor and update electronic Raiser's Edge procedure manual.
- Establish and monitor policies, procedures and quality control measures for gift administration.

Priority: A

Essential

Percent of Time: 40

2. **Serve as the business process and application expert for gift administration, within continually changing and expanding technological platforms, including but not limited to: Blackbaud Merchant Services, Raiser's Edge, Raiser's Edge NXT, Financial Edge, Financial Edge NXT, Online Express, Classy, Double The Donation.**
 - Develop gift administration processes to accommodate an increasing variety of complex data and technology platforms and programs:

- Assess long and short-term uses of current and proposed platforms.
 - Enhance data streaming and application integration efforts.
 - Create strategies, directions, goals and objectives to meet technology needs for gift administration.
 - Research, analyze and make recommendations on proposed technologies and platforms.
 - Advocate, support, and demonstrate confidentiality, integrity, security, and adherence to University Advancement and University guidelines when accessing gift administration technologies.
- Establish procedures and schedules to regularly analyze, monitor and edit data to improve and optimize data health and integrity.
 - Maintain accuracy of giving and biographical data in more than 100 related data fields within each record of the relational database. Database currently contains over 130,000 constituent records and over 500,000 gift records.
 - Envision the need for new gift administration policies; research and collaborate to determine system constraints; develop and establish processes and procedures; identify/create necessary coding; implement; notify and train affected staff.
 - Identify nuanced patterns of data entry errors, and develop and implement solutions through positive communication with Advancement Systems & Data Analyst to ensure rectified and continued compliance.
 - Proactively develop and implement processes and solutions to reduce record duplication and data inconsistencies and errors. Identify and merge duplicate records.
 - Develop and conduct regular audits of, and corrections to the data entry process to promote data health.
 - Identify and amend historic gifts entered inconsistent with current practices. Notify Director of Advancement Finance.
 - Establish and implement an annual review process for the inactivation of Campaigns, Funds and Appeals
 - Perform an annual audit of gift batches, queries, and reports to be purged from the database.
 - Establish policies and procedures for examination and determination of pledge write-off's.
 - Assign, train and audit data entry-assignments.
 - Work with Assigned Solicitor to determine the need for a full record for spouses of deceased donors.
- Database Management
 - Extract, manipulate and import parent data into Raiser's Edge using an outside application (i.e. ImportOmatic). Merge duplicate records, cleanup biographical information and run statistical reports.
 - Assist Raiser's Edge users with resetting passwords and unlocking timeouts. May also edit user access to include additional editing rights.
 - Update and maintain Raiser's Edge electronic procedure manual. Notify affected users and provide training.
 - Process NetCommunity sign-up requests and profile updates, to create or update records and grant permissions.
- Advise, train, educate, and support the development staff and student workers on gift administration processes, procedures, changes, reporting and best practices, to position them for success in relationships with donors, prospects, and community partners.
- Attend Prospect Development team meetings to collaborate and make recommendations on the gift administration implications of fundraising proposals.
- Provide analysis, input and recommendations on printed and electronic gift solicitation pieces, gift classification, allocation and processing services to ensure consistent, accurate and efficient gift allocation.
- Serve as a resource to donors, Directors of Development, campus community regarding gift and pledge related questions and concerns, such as allocation adjustments, refunds, and pledge write-offs.
- Formulate queries to manage and report on a wide range of financial, philanthropic, and donation activity.
- Adhere to PCI DSS (Payment Card Industry Data Security Standards) compliance for processing credit card transactions.
- Collaborate with the Director of Advancement Finance and the Advancement Systems & Data Analyst to develop and implement a recovery strategy in the event of a data disaster.

Priority: A

Essential

Percent of Time: 40

3. Monitor, cleanse, and import into the database

- Data projects.
- Import new students.
- Run suggested and pre-paid annual updates in Blackbaud.

Priority: A **Essential** **Percent of Time:** 10

4. Serve on the Advancement Services team to evaluate internal and external alumni and donor data requests, within the context of data privacy policies and practices.

- Understand and maintain donor data confidentiality standards as they apply to specific data requests (including FERPA, MN State Government Data Practices guidelines, and WSU FERPA compliance policies).
- Author custom responses to requests for alumni and donor data.
- Maintain log of requests and decisions for received data requests.
- Attend and contribute to weekly Advancement Services team meetings.
- Notify requestor of decision or referral.
- Direct Alumni Assistant to fulfill approved data requests.

Priority: A **Essential** **Percent of Time:** 5

5. Perform other duties as assigned to ensure the smooth functioning of the department and maintain the reputation of the organization as a viable business partner.

- Assist/participate in University Advancement events.
- Participate in university committees and task groups as appropriate.
- Serve on hiring search committees as appropriate.

Priority: B **Secondary** **Percent of Time:** 5

Priority: Essential-if responsibility is reason job exists, is a highly specialized task or one that requires special education or training licensure, requires a great % of time, has a high level of accountability (consequences are considerable to others or the institution if failure to perform), the responsibility is essential; Secondary-if not essential, then responsibility is secondary; **Discretion (optional):** A-Employee investigates situations, makes decisions, takes appropriate action reports by exception and through normal review processes; B=...reports to supervisor immediately after action is taken; C=...makes decisions with supervisor....reports to supervisor immediately after action is taken; D=Employee discusses situations with supervisor before investigation, makes decisions with supervisor, takes appropriate action, and reports to supervisor immediately after action is taken.

KNOWLEDGES, SKILLS, AND ABILITIES

Minimum Qualifications (expected to have to enter job)

- **Math**-Sufficient to add, subtract, multiply and divide when working with donations. **Typing** **Keyboarding(40WPM)**-Sufficient to draft correspondence for the VP, Data Entry Performance-Sufficient to enter data into databases utilized, **Communication Skills (Speaking, Writing and Reading)**-sufficient to communicate with customers of the department via email and in person, **Word Processing**-sufficient to draft correspondence for the VP, **Spreadsheets**-sufficient to enter information into databases, create filters, create reports and update data, **Database Management**-sufficient to utilize Advancement software databases and run queries and reports, and identify problems and resolve, **Bookkeeping**-sufficient to monitor the financial entries and identify discrepancies, **Accounting/Budgeting/Expense**-Sufficient to create reports on the Foundation budget and report to the Board of Directors, **Customer Service Skills**-sufficient to serve as a representative for the department and greet customers, **Lead Work Skills**-sufficient to provide training to users of the databases in Advancement and serve as the point of contact, and **Development of Administrative and Programmatic Procedures**-sufficient to continually monitor processes of the Advancement Office and make suggestions for procedure modification

Preferred Qualifications (*desired but not expected to have to enter job*)

- Bachelor's degree in Business, Accounting or related field or equivalent experience
- Proficient with Raiser's Edge database
- Knowledgeable of IRS, CASE, state and federal laws regarding fundraising and gift receipting.
- Proficient in creating queries and running reports.
- Ability to interact with a diverse range of personalities and work-styles.
- Ability to maintain a high level of professionalism.
- Ability to train.
- Self-motivated with the ability to multi-task and work in a fast-paced environment.
- Strong organizational skills.

RELATIONSHIPS

This Position Reports to (*provide class title, not person's name*): Vice President for University Advancement

Supervises (*classification title; FTE; # in position; note if providing work direction only*)

Classification Title	FTE	# in Position	Providing work direction only
Student Workers	30-40 hours/wk	1	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>(Type an X in box)</i>

Internal and External Clientele and Purpose of Contact (*the most significant job related contacts*)

The Gift Administrator works closely with the Vice President of University Advancement, University Advancement Directors and Advancement support staff; other university staff, faculty and administrators up to and including the President; Foundation Trustees; donors and prospects, alumni and friends of the university; consultants, auditors, attorneys, trust and bank officers, financial advisors; and local business and community leaders. Contact consists of obtaining and providing essential details regarding donations, projects and funds, to ensure accurate accounting, recording, receipting, acknowledging and reporting of donations and donor specifications; and providing supporting documentation for mandated MNState, State of MN and the IRS audit. The Gift Administrator will collaborate with other MinnState universities to discuss their standard practices or technology choices as it relates to research for development of work processes or implementation of new systems.

PROBLEM SOLVING (*most difficult types of problems to resolve and consequence of error/non-resolution*)

The Gift Administrator has full responsibility for independent decisions related to all aspects of the position, which directly and indirectly impact delicate donor relationships and has philanthropic implications. This position must investigate and resolve subtle inconsistencies in donor and gift data to ensure accurate reporting and receipting. This position must determine and apply relevant IRS, CASE, FERPA, MN Government Data Practices guidelines, WSU Regulation 6-1 (Gift Processing and Scholarship Procedure) and department guidelines with possible legal and tax implications.

When problems arise outside the scope of established procedure, the Gift Administrator investigates a solution and takes appropriate corrective measures, which may involve: creating new queries to analyze the data, reviewing current related procedures, researching and testing capabilities of current technologies, establishing new procedures, defining norms and standards, or recommending new technologies. If problems are not

resolved in a timely manner they can result in under or over reporting donors, donations, fund balances, membership lists, etc.

The Gift Administrator will secure the continuance of user access to Blackbaud technologies, will adjust Blackbaud user rights to enable access to appropriate fields/actions and will assist users with technology issues by working with IT and Blackbaud support to provide a remedy. If technologies fail to produce e-receipts or if donation page is off-line, the Gift Administrator will initiate an internal investigation and will communicate the solution to the donor and advancement staff.

FREEDOM TO ACT

Budget (*\$ authority and/or type of impact on budget, i.e., signatory, manage, monitor, recommend*)

Make recommendations pertaining to WSU Foundation donations \$4,000,000 annually

Decision(s) Position Makes and Decision(s) Referred to Higher Authority *This description is intended to indicate the kinds of tasks and level of work difficulty required of the position. It is not intended to limit or modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar level of difficulty.*

Except for specific instructions received, freedom to act is not restricted. The Gift Administrator is the gatekeeper and quality assurance monitor for the University Advancement fundraising database. The Gift Administrator identifies and develops new solutions, procedures and policies to ensure accurate and complete donor data/reporting and efficient, effective work processes. The Gift Administrator uses sole discretion to determine best standards for maintaining Winona State University donor data. For example, the Gift Administrator is empowered to determine the actual donor when a contribution is received through a third-party organization or trust; to make adjustments in donor crediting, data entry procedures or classifications; and to create the policy or guidelines to ensure the adjustments are implemented and understood by other Advancement staff.

Supervisor approves budgetary items for conference or workshop attendance. Supervisor will determine approval for technologies that Gift Administrator has researched, and if implemented will provide value to achieve University Advancement goals and mission. Supervisor is available for support and authority for instances beyond the scope of the Gift Administrators position description.