



JOB DESCRIPTION

TITLE

Gift Processing Specialist

JOB SUMMARY

The position is responsible for performing a variety of complex duties associated with highly confidential gift processing functions. Responsibilities include receiving, processing and recording all gifts made to the University or the TWU Foundation. Responsibilities also include entering pledges and pledge payments, processing matching gifts, database management and generating institutional donor acknowledgement letters and reports. Work is performed independently and requires the employee to be able to schedule, supervise, and set priorities. Evaluation is based upon successful completion of assignments and established goals. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Director of Institutional Development

Supervises: May supervise staff and/or student assistants as necessary and/or appropriate.

ESSENTIAL DUTIES - *May include, but not limited to the following:*

Processing of Gifts

- Performs a variety of complex duties associated with highly confidential gift processing functions.
- Receives and processes gifts in the form of cash, checks, credit cards, oil and gas royalty payments, or other valuables.
- Processes (or supervise the processing of) more complex transactions, including stock transactions, matching gift transactions, in-kind gifts, and payroll deductions.
- Analyzes each gift and accompanying documentation to determine the proper way to deposit the gift.
- Researches missing information or requests clarification and forwards any misdirected monies to appropriate persons.
- Ensures all gifts are entered in database system in a first-in, first-out method.
- Ensures all gifts are posted within three days of receipt and promptly acknowledged per University policies.

- Prepares bank deposits for TWU Foundation gifts and arranges for transmittals for gifts made payable to the TWU Foundation but intended for University accounts.
- Prepares check requests for transfer of money from University for gifts intended for the TWU Foundation.
- Posts multi-fund online gifts directly to Oracle General Ledger and communicates with Controller's Office for approval process.
- Processes new payroll deductions requests and ensures accuracy of deduction spreadsheet received from Payroll and posts payroll deductions to database.
- Enters pledges and pledge payments in an accurate and timely manner into a complex database system.
- Maintains a tickler file for recurring credit card gifts.

Donor Acknowledgements/Stewardship

- Processes computer-generated receipts for gifts less than \$100.
- Generates donor acknowledgement letters for Development Officers on gifts of \$100-999 and for Office of the Chancellor and President on larger gifts.
- Creates and sends all pledge reminders directly to donors.
- Conducts pledge write-offs as requested by development staff and maintains file of such requests.
- Notifies family members of gifts given in honor or/in memory of someone.

Gift Records and Documentation

- Ensures that copies of gift documentation and acknowledgement letters (for gifts of \$250 or more) are filed in donor files and electronic donor database.
- Maintains documentation of all posted gifts, filed in chronological batches.
- Maintains notebook of daily posting reports.
- Maintains system of matching gift company documentation and matches in-progress and communicates with matching gift coordinators at corporations as needed.

Database & Gift Processing Management

- Assists in maintaining and updating donor database.
- Responsible for tracking and updating any needed forms and other supplies for gift processing.
- Sets up new fund records in database with designation numbers linked to Oracle accounts.
- Sets up new campaign codes, appeal codes, constituent codes in database.
- Coordinates with Offices of Bursar and Information and Technology Services on procedures for posting gifts to Oracle database and on any problems that may occur in posting.
- Ensures that daily and weekly reports are available to Institutional Development staff as well as other routine reports.
- Enters private grants into database as well as proposals submitted by various departments.

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- Manually adds students from Colleague into Institutional Development in order to post gifts from students or to link students to gifts given in their honor.

Institutional Development Support

- Serves as liaison between Institutional Development and Information and Technology Services for online giving process.
- Maintains online giving menu and retrieves gift information for posting to database.
- Responsible for staff security levels in database and ensures that all users sign Confidentiality Agreement.
- Maintains and adds to Development Services Policies and Procedures notebook.
- Serves as back-up for Data Analyst position
- Communicates with Conference Services monthly to get list of Little Chapel Brides for entry into database.
- Works to clean up database after new graduate imports and other major changes.

ADDITIONAL DUTIES

- Performs other duties as requested.

EDUCATION

Bachelor's degree.

EXPERIENCE

Four years progressively responsible experience in accounting or financial reporting principles as well as experience in information technology systems.

REQUIREMENT

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position.

KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:

- Knowledge of current trends and fund raising practices, methods, resources and regulations
- related to the position.
- Knowledge of computer technology and software programs and their application to information management.
- Working knowledge of office practices and methods.
- Ability to establish and maintain effective work relationships with other employees and the public.
- Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.

- Ability to apply budgeting and fiscal planning techniques within financial constraints.
- Ability to communicate effectively - orally, by phone, in person, and in writing.
- Ability to travel to events on business-related matters.
- Ability to file and perform data entry.
- Ability to use a personal computer and other office equipment, including related university software and email.
- Working knowledge of Blackbaud Raiser's Edge database system.

PHYSICAL DEMANDS

The physical demands described in the Essential Duties and below are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

The employee may be required to travel.

WORK ENVIRONMENT

All employees are responsible for maintaining an environment that is free from discrimination, intimidation, harassment, including sexual harassment. Work is normally performed in a typical interior work environment.

SAFETY

TWU promotes a safe working environment. Employees are responsible for completing assigned tasks safely and efficiently, and supervisors are responsible for creating and maintaining a safe work environment. Employees must report any unsafe work conditions or practices, as well as any near-miss incidents, to their supervisor and Risk Management. Supervisors and employees should ensure that injury/accident reports are submitted to the Office of Human Resources and Risk Management within 24 hours of the incident.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____

Date: _____

Employee Printed Name: _____

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Texas Woman's University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman's University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, gender, sex, sexual orientation, ethnic origin, age, veteran's status, or against qualified disabled persons.

All positions at Texas Woman's University are deemed security sensitive requiring background checks.