ALUMNI & DONOR RECORDS ASSISTANT

The Alumni & Donor Records Assistant will create and update gift, pledge, and constituent electronic records for the UVM Foundation. Job functions include: performing accurate data entry of gift, pledge, biographic, and demographic information; creating, processing, and reconciling accounting files to feed information to the accounting system; preparing bank deposits; and working with standard Microsoft Office tools. This position will report to the Director of Alumni & Donor Records.

ESSENTIAL FUNCTIONS

20% Prepare donations received by mail, phone, and online processing for data entry. Run credit cards manually on machine.

30% Enter donations and code matching gift claims, verify data entered, and approve gift batches for processing in the Foundation’s fundraising database (Advance).

10% Verify totals from gift entry, create reports, and confirm the daily feed to the Foundation’s accounting system (Abila Fund Accounting). Prepare bank deposits and process electronically to the bank through the Remote Capture program.

30% Accurately enter and maintain biographic and demographic data. Receive, verify, and process data collected from various forms, documents, surveys, directories, email, parent communications, campus communications, and other sources of information related to constituents. Code constituent records for publications, special mailings, committees, and activities. Code contact information on prospect records.

5% Respond to inquiries and requests from donors, Foundation staff members, and University staff members regarding donations and personal data. Search computer files and hard copy records as needed to answer inquiries. Investigate and solve specific gift and biographic problems or questions.

5% Create and/or maintain documentation of office processes and procedures. Participate in cross-training, and train new staff members as required.
Work at Foundation events to support the activities of the organization.
Perform other duties as assigned.

REQUIRED SKILLS & ABILITIES

- Associate’s degree with two years of experience in the financial field, or equivalent experience from which this knowledge can be gained.
- Strong consideration of team needs and fair distribution of workload to meet departmental deadlines.
- Experience with data entry, coding, and verification with a very strong and focused attention to detail.
- A working knowledge of software applications used to support office functions (Microsoft Excel and Microsoft Word) and familiarity with Internet resources.
- A collaborative and team-oriented style combined with the ability and desire to achieve a high level of individual productivity, success, and accuracy.
- Strong interpersonal skills and experience in exercising discretion in a complex, and every evolving work environment.
- The ability to maintain a high level of confidentiality.
- The ability to function, focus, and meet deadlines in a busy environment.
- Effective problem-solving skills with the ability to communicate effectively in person, in writing, and by phone.
- Excellent customer service skills.

PREFERRED SKILLS & ABILITIES

- Experience with Federal regulations and policies related to charitable giving.
- Experience with accounting and accounting software.