



## Alumni Affairs & Development Job Family: **Gift Processing Assistant Progression**

These generic job title summaries are intended to indicate the kinds of tasks and levels of work complexity that will be required of positions classified to any of these titles and are not intended to be construed as declaring the specific duties and responsibilities of any particular position. The use of particular expressions or illustrations describing functions within a specific job title does not exclude other duties of a similar kind and/or level of complexity. Positions are classified to a particular job title based upon the predominant level of expected work complexity.

### GENERIC JOB PROFILE SUMMARIES

Gift Processing Assistant II INDIVIDUAL CONTRIBUTOR	Gift Processing Assistant III INDIVIDUAL CONTRIBUTOR	Gift Processing Assistant IV INDIVIDUAL CONTRIBUTOR
	Perform/be able to perform most or all of the duties and responsibilities of the Gift Processing Assistant II level.	Perform/be able to perform most or all of the duties and responsibilities of the Gift Processing Assistant III level.
Verify, create and maintain complete and accurate biographic, demographic and/or gift related data through direct mail and/or online donation portals.	Verify, create and maintain complete and accurate biographic, demographic and/or gift related data through direct mail and/or online donation portals.	Oversee complete and accurate biographic, demographic and/or gift related data; assess direct mail and online donation portals and recommend approaches for process enhancement.
Apply appropriate account number; input, batch, reconcile and verify data using various computer software according to established procedures.	Determine appropriate account number; process, reconcile and verify batch data and set up payment schedules and pledge maintenance for consistency and correct discrepancies as they arise.	Oversee timely and accurate donor pledge processing and gift recording; process and reconcile complex pledges and resolve issues and discrepancies. Be knowledgeable about compliance, credit card security and IRS rules and regulations, gift-in-kind, securities and life insurance and other planned giving vehicles.
	Review and interpret data, work with various University staff and corporations and foundations to compile required information.	Work with various University staff and corporations and foundations; develops procedures for regularly enhancing and cleaning data Assist in defining and documenting policies and procedures.
Draft donor acknowledgement letters and acknowledgement gift and mailings; issue gift receipts and generates pledge payment reminders	Prepare and coordinate mailings and solicitations; maintain fulfillment gift inventory; set up receipt and payment reminder schedules	Coordinate and oversee mailings, solicitations and direct mail campaign materials; partner with vendors to create and recommend fulfillment gift packages.

<b>Gift Processing Assistant II INDIVIDUAL CONTRIBUTOR</b>	<b>Gift Processing Assistant III INDIVIDUAL CONTRIBUTOR</b>	<b>Gift Processing Assistant IV INDIVIDUAL CONTRIBUTOR</b>
Answers straightforward questions referring complex issues	Answers questions independently, serves as reference to guarantee satisfactory customer service.	Ensures satisfactory customer service, serves as liaison to donors, development staff and University departments.
Assist with identification of inaccuracies in database.	Identify inaccuracies in database and assist in evaluation of data; research and recommend solutions and correct inaccuracies as assigned.	Verify accuracy of database and evaluation of data, analyze inaccuracies and correct complex errors. Test and implement new solutions to improve process and overall accuracy.
Generate and prepare contribution reports.	Create and generate reports for internal and external client needs; produce straightforward data queries and exports.	Use a series of queries, exports and merges to generate batches of specialized letters of acknowledgement, special reports, reminders, pledge packages and receipts.
	Assist with the alignment of current projects, available resources and future program outcomes.	Partner with manager for alignment of current projects, available resources and future program outcomes.
Perform light research; assist with special projects as requested.	Prepare basic biographic and/or gift data reports; Utilize data demographics to recommend members/client solicitation to accurately guide profile management.	Create biographic and/or gift data reports; Utilize data demographics to recommend members/client solicitation to accurately guide profile management.
	Help identify volunteers and may assist with training	Select and train volunteers and act as team lead to staff; assign daily tasks
		Participate in annual planning or campaign planning

## JOB FACTOR PROFILE TABLE

FACTOR PROFILE	10232 GIFT PROCESSING ASSISTANT II, BAND B	11431 GIFT PROCESSING ASSISTANT III, BAND C	11727 GIFT PROCESSING ASSISTANT IV, BAND D
<b>MINIMUM EDUCATION AND EXPERIENCE EQUIVALENCY</b>	High school diploma; up to 2 years experience or equivalent.	High school diploma; more than 2 and less than 4 years experience or equivalent.	Associates Degree; more than 2 years, but less than 4 years experience or equivalent.
<b>IMPACT</b>	Extends beyond department	Extends beyond department	Extends beyond department
<b>CONTACTS - INSIDE</b>	Assists others Cooperation of task completion Handle confidential information	Coordinate Activities Contribute to group projects Handle confidential information	Coordinate Activities Contribute to group projects Handle confidential information
<b>CONTACTS - OUTSIDE</b>	Limited Contact	Straightforward business Provide factual information	Straightforward business Provide factual information
<b>CONTACTS - STUDENTS</b>	Provide information or instruction on policies/procedures	Provide training and instruction on equipment, instruments, machinery, methods	Provide training and instruction on equipment, instruments, machinery, methods. Provide information or instruction on policies/procedures

<b>FACTOR PROFILE</b>	<b>10232 GIFT PROCESSING ASSISTANT II, BAND B</b>	<b>11431 GIFT PROCESSING ASSISTANT III, BAND C</b>	<b>11727 GIFT PROCESSING ASSISTANT IV, BAND D</b>
<b>SUPERVISION</b>	Students Temporaries On-the-job training	Students Temporaries and volunteer On-the-job training	Group leader Full responsibility for students, temporaries, students and volunteers On-the-job training
<b>COMPLEXITY</b>	Entire field tasks	Focus on an entire field	Focus on an entire field
<b>LEVEL OF DECISION MAKING</b>	Responsible for making routine decisions within limits prescribed by established policies or by supervisor	Responsible for making some decisions which require consideration of various criteria	Responsible for assisting, contributing to and influencing decisions on setting policies and/or procedures, research, planning and development activities
<b>FREEDOM OF ACTION</b>	General supervision Proceeds alone on regular tasks Refers questionable situations to the supervisor	General supervision Proceeds alone on regular tasks Resolves most problems	Little guidance to accomplish work activities Rarely refers situations to the supervisor
<b>SUPPORT SKILLS – WRITING</b>	Provide standard responses to inquires	Provides non-standard response or prepares written material that requires some research	Provides non-standard response or prepares written material that requires some research
<b>SUPPORT SKILLS – COMPUTER</b>	Uses business or technical programs for data input or word processing to create documents or reports	Uses a variety of business or technical programs to complete information management or production tasks	Uses a variety of business or technical programs to complete information management or production tasks
<b>WORKING CONDITIONS - PHYSICAL</b>	Lift less than 25 lbs.	Lift less than 25 lbs.	Lift less than 25 lbs.

FACTOR PROFILE	10232 GIFT PROCESSING ASSISTANT II, BAND B	11431 GIFT PROCESSING ASSISTANT III, BAND C	11727 GIFT PROCESSING ASSISTANT IV, BAND D
WORKING CONDITIONS - VISUAL	Close concentration and visual attention	Close concentration and visual attention	Close concentration and visual attention
WORKING CONDITIONS - HAZARD	Limited exposure	Limited exposure	Limited exposure