



Job Description

(For Positions in CAW Local 555, Unit 1)

Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.

JD #:	JD00085	Pay Grade:	5
JD Title:	Advancement Services Clerk	JD FTE Hours:	35
Job Family:	PR/Alumni		

General Description

The Advancement Service Clerk plays an important role in increasing the financial support to the University by keeping University Advancement’s database up to date with the most recent, accurate biographical and donation information available. This position involves two components - Donations processing and Biographical updating. As a key member of the University Advancement team, this position is responsible for making a positive commitment to University Advancement’s mission, vision and values and principles: Integrity, Quality, Respect, Service, Strategy and Teamwork. Some evening and week-end work as well as travel may be required.

Representative Duties & Responsibilities

- Prepare batches by reviewing and sorting donations on hand, both Canadian and Foreign gifts, and group them by payment type such as cheque, cash, credit card, payroll deductions, gifts in kind both assets and property, securities transactions, insurance premiums, corporate cheques and bequests from individual donors, alumni, corporations and foundations.
- Acknowledge which area of the University the donor may wish to give.
- Review pledges to determine when the pledge begins, how the donor wishes to pay such as future pledge reminder or a variety of automated banking methods like pre-authorized chequing and credit cards, and the total pledge amount.
- Perform financial analysis when balancing major fundraising.
- Process gifts whether they are donated through mail, online via website, faxed, emailed, hand delivered, through events and memorial services via specific and detailed instructions.
- Upload donations data by obtaining data from various reports and entering the required information into a series of computer programs to prepare for a batch entry.
- Upload biographical data by creating new batches each day to upload changes obtained by the annual giving phone centre and updates done directly on the alumni web community website while ensuring they are accurate and reflect all biographical policies and procedures.
- Ensure that donors’ credit cards are not multi-billed.
- Ensure postdated cheques are accounted for and incorporated into financial analysis.
- Work with payroll to calculate monthly payroll deductions.
- Prepare and provide financial reports for balancing processed credit card transactions.
- Prepare and provide foreign exchange rates and conversions to Canadian dollars.
- Perform a treasury function by ensuring that all processed cheques and credit cards are recorded in the University’s on-line cashier system, and deliver the required paperwork to the cashier’s office.
- Ensure all rules and regulations are in accordance with Canada Revenue Agency and Cash Control Policy.
- Ensure Privacy Laws and University Advancement confidentiality policies are adhered to when dealing with donor and biographical information.
- Produce daily batch reports on all donations processed, reconcile receipt totals to computer inputs to cash, cheques and credit card transactions deposited with the University’s central cashiers.
- Review specific criteria at month end in order to produce payroll, postdated credit card and delinquent donation reports, and record monthly statistics.
- Prepare and provide quarterly statistic reports.
- Generate receipts, acknowledgement letters, and pledge reminders by loading database extracts into Excel spreadsheets and merging with Word documents to create various document formats such as charitable tax receipts,

Representative Duties & Responsibilities

personalized donor acknowledgement letters, pledge reminders for donors on pledge, and follow-up documents for donors who are delinquent.

- Maintain tables by creating new table fields or modifying existing fields on a regular basis as directed by supervisor.
- Utilize several systems on a daily basis, including ADVANCE, Request System, IBM for cashier receipts, Oracle, Microsoft Office suite, with particular focus on Excel work.
- Accurately file all donation information as all donation information is subject to audit by internal, external and government agencies and departments. Filing the most current information is paramount to prove a complete audit trail on every donation made to the University.
- Update, when required, and maintain a complete set of procedural manuals so that all functions can be carried out in the event of any absences.
- Ensure the University Advancement database (ADVANCE) is updated with the most current biographical and donation information at all times and conduct tracing efforts to maintain alumni address accuracy goal and provide all University Advancement staff with up to date contact details. Currently ADVANCE stores over 170,000 records with details referencing an extensive array of entity information such as names, addresses, relationships, degrees, employment information, philanthropic interests, and other activities.
- Contribute to over 138,000 informational additions, changes or modifications which are updated annually in accordance with very strict rules that ensure accuracy and consistency across the database which is essential to ensure the quality of every other ADVANCE user's use of the system.
- Review large volumes of incomplete and incorrect data and accurately update all information.
- Responsible for the accuracy of data collected from a variety of sources such as tracing lost Alumni projects, the Alumni Website automated uploads, phone centre communications with alumni, mailed in entity responses, newspaper announcements and campus-wide McMaster University staff submissions.
- Provide University Advancement Senior Management with timely financial information on the accumulated total success of fundraising at McMaster.
- Provide Development Officers with pertinent information required for them to meet their own fundraising goals.
- In the absence of an Advancement Services Administrative Assistant, assist with a variety of administrative tasks including, but not limited to, reception, journal entries, part-time payroll submissions, cheque requisitions, and mail distribution.
- Play an important role in computer technology changes and data or process automations by testing and comparing information generated by old and new systems, running verification reports that identify anomalies, inconsistencies or errors and work with computer programming staff to correct problems, and convert procedural routines as a result of these changes or automations.
- Update web page and internal intranet site.
- Provide administrative support and prepare progress reports for a variety of projects.

Supervision

- Provide assistance to the supervisor, as required, in training and ensuring new staff adhere to standards and work tasks.

Qualifications

- 1 year Community College diploma in Office Administration, or relevant field of study.
- Requires 2 years of relevant experience.
- Must be proficient in MS Office package, with excellent EXCEL, Internet research, bookkeeping and keyboarding skills.
- ADVANCE system experience is a requirement.
- Must be accurate and organized. Meticulous attention to detail is mandatory.
- Must be able to work in a results oriented environment.
- Must have strong interpersonal and communications skills.

Effort

Physical Effort:

- A typical work day consists of up to 2 hours of low physical effort for activities such as:
 - Intermittent periods of keyboarding to word process documents and validate data.
- A typical work day consists of greater than 3.5 hours of moderate physical effort for activities such as:
 - Entering data into databases for prolonged periods of time.
- Elements of high physical effort are not a regular feature of this job.

Mental Effort:

- A typical work day consists of greater than 3.5 hours of routine mental effort for activities such as:
 - Responding to routine inquiries, processing routine documents such as letters and forms, and inputting data into a databases.
- A typical work day consists of up to 3.5 hours of moderate mental effort for activities such as:
 - Preparing batches by reviewing and sorting donations on hand, both Canadian and Foreign gifts, and grouping them by payment.
 - Performing financial analysis when balancing major fundraising.
 - Working with payroll to calculate monthly payroll deductions.
 - Preparing and providing financial reports for balancing processed credit card transactions.
 - Testing and comparing information generated by old and new systems, running verification reports that identify anomalies, inconsistencies or errors and working with computer programming staff to correct problems.
- Elements of high mental effort are not a regular feature of this job.

Working Conditions

Physical Environment:

- There are no adverse physical environment conditions inherent to the job.

Psychological Environment:

- Occasionally interacts with individuals who may be rude or upset.
- Frequently handles competing requests and simultaneous deadlines.

Health & Safety:

- Periods of prolonged keyboarding to enter data into databases.

Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	JD00085	Pay Grade:	5
JD Title:	Advancement Services Clerk	Total Points:	388
Job Family:	PR/Alumni		

Factor	Subfactor	Level Rating	Points
Skill	1. Applied Reasoning and Analytical Skills	3.5	71
	2. Breadth of Knowledge	2.0	13
	3. Adaptation to Change/Updating of Learning	2.0	12
	4. Interpersonal Skill	2.5	31
	5. Education and Experience	C2	48
	6. Dexterity and Coordination	3.0	21
Effort	7. Physical Effort	3.0	18
	8. Mental Effort	2.0	33
Responsibility	9. Planning and Coordination	2.0	28
	10. Responsibility for Others	2.0	33
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	2.0	39
Working Conditions	12. Physical Environment	1.0	3
	13. Psychological Environment	2.0	10
	14. Health and Safety	3.0	28