



## BCGEU POSITION DESCRIPTION

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<b>POSITION TITLE:</b>	Data Systems Coordinator	<b>JOB NUMBER:</b>	242
<b>REPORTS TO:</b>	Director of Advancement	<b>INCUMBENT:</b>	Eunmi Byeon
<b>DEPARTMENT:</b>	Office of Advancement	<b>DATE CREATED:</b>	November 2005
<b>JOB CLASS:</b>	8	<b>DATE REVISED:</b>	June 24, 2021

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### PRIMARY FUNCTION

The Data Systems Coordinator is responsible for efficient and accurate gift processing, report generation, list segmentation, and producing data reports for analysis, while serving as the front-line reception for the department. This position is key to optimizing the relational database Raiser's Edge (RE) and its cloud interface RE NXT, and is a primary resource for executing intermediate to advanced data functions such as defining queries, exports and imports. The incumbent guides RE users within the Advancement team, as well as develops and monitors team adherence to standard operating procedures. The incumbent coordinates and facilitates the annual student awards processes undertaken by the Office of Advancement, and supports fundraising and donor recognition event execution.

### JOB DUTIES AND TASKS

1. Maintain the Alumni and Advancement fundraising database (currently Blackbaud Raiser's Edge (RE) and it's cloud interface RE NXT).
2. Process confidential donations, pledges, direct awards and sponsorship payments.
3. Ensure gifts are coded properly for reporting purposes.
4. Record assign codes, validate and commit RE batches.
5. Coordinate with Advancement fundraising staff (Executive Director, Director, Advancement Officers) to facilitate options for gift-giving, including payroll, monthly and annual pledge payments; processes bank transfers, credit card and cheque payments.
6. Produce charitable tax receipts and acknowledgement letters via the RE Mail module.
7. Evaluate requests for gift adjustments and pledge write-offs in RE under the direction of the Data Systems Administrator.
8. Set up and create new RE Fund records and coordinate with Finance and Student Awards and Financial Assistance Office (SAFA).
9. Create/produce queries and reports; analyze data and provide recommendations and/or present data for analysis to Advancement team members.
10. Add/update constituent records in RE.
11. Manage records duplication and data clean-ups, and identify and link related records.
12. Add/import appeals, actions, notes, attributes and consent information following the deployment of various solicitation and engagement activities.
13. Update RE Mail templates in database view.
14. Create shared dashboard panels in RE NXT.



15. In collaboration with the Data Systems Administrator, research best-practice and develop standard operating procedures for the department, particularly in the area of working with our fundraising database, filing systems on OneDrive, and department Toolkit on SharePoint.
16. Provide training to staff on procedures under the direction of the Data Systems Administrator.
17. Prepare various documentation such as fundraising reports, form letters and memos; distribute to appropriate individuals.
18. Coordinate with Executive Director, Director, Advancement Officers and SAFA to establish new student award criteria, donor and fund records.
19. Run the FAST Reporting system and provide the available balance of funds to Advancement team members (including the Executive Director, Director and Advancement Officers) and SAFA.
20. Liaise with Finance Office and SAFA to perform fund transfers and facilitate student awards processing.
21. Perform reception duties for the Office of Advancement: answer the main phone line and direct to appropriate staff, monitor and manage the centralized Advancement email account/ inbox, and provide information to campus and external.
22. Support fundraising and donor stewardship events: manage registration, payment functions, and coordinate silent auctions; participate in planning and execution of events; must be able to lift and carry materials in the range of 10-20 lbs. to and from events, and order and maintain event promotional materials.
23. Maintain current working knowledge of Canada Revenue Agency (CRA) regulations and best practices for the recording and receipting of gifts.
24. Other related duties, as assigned.
25. Contributes to and promotes a safe, respectful, and inclusive work environment by adhering to University policies and procedures and completing mandatory training programs.

**SUPERVISION RECEIVED:**

This position reports to the Director of Advancement (work is supervised by the Data Systems Administrator).

**SUPERVISION/DIRECTION EXERCISED:** N/A

**PHYSICAL ASSETS/INFORMATION MANAGEMENT:**

Maintain and update confidential database, electronic and paper office filing systems. Operate, maintain and troubleshoot various office equipment such as computer and photocopier. Must be able to lift and carry materials in the range of 10-20 lbs. (primarily office and event supplies, on occasion).

**FINANCIAL RESOURCES:**

Check accuracy and completeness of calculations on various forms and lists. Track financial transactions and accounts using database applications.

*The above statements reflect the general details considered necessary to describe and evaluate the principal functions of the job identified, and shall not be construed as a detailed description of all the work requirements that may be inherent in the job.*

**EMPLOYER REQUIRED KNOWLEDGE SKILLS AND ABILITIES**

- Demonstrated ability to maintain accounting and database management systems.
- Demonstrated advanced level of competency in computer applications such as Word, PowerPoint, Excel, Adobe Acrobat Pro, and mail merge functions.
- Intermediate to advanced level current knowledge of Blackbaud Raiser's Edge & NXT database system required.



- Ability to be a self-starter, exercise a high level of initiative and responsibility, work independently, establish priorities and meet deadlines.
- Demonstrated knowledge and ability to manage routine office systems and procedures such as filing systems, clerical control systems, and record-keeping.
- Be able to key 40wpm accurately.
- Proven ability to operate, troubleshoot and maintain standard office equipment.
- Proven ability to provide quality customer service.
- Ability to interact effectively with a variety of individuals with diverse backgrounds and needs, and to liaise effectively and diplomatically with a wide variety of internal and external stakeholders.
- Demonstrated ability to deal with sensitive situations that call for the use of patience, diplomacy, tact and professionalism in the delivery of information and explanations.
- Demonstrated judgement, discretion and the ability to maintain a high degree of confidentiality.
- Demonstrated ability to communicate effectively in English both verbally and in writing.
- Proven ability to pay attention to detail.
- Knowledge of the principles of marketing, fundraising and ethics.
- Fundraising experience as a staff member or volunteer an asset.
- This position requires occasional evening and weekend work (usually to participate in event execution).

#### **EMPLOYER REQUIRED EDUCATION & EXPERIENCE**

- High school graduation and minimum five year's previous related office experience, including a minimum of three year's experience in Advancement Services/fundraising support.

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Knowledge Skills & Abilities revised:

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