OUR REWARD PRACTICES/

JOB DESCRIPTION:

Gift Processing Officer

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| **Generic role title:** | Gift Processing Officer |
| **Job family:** | Administration, Professional & Managerial |
| **Reference number:** | HR to complete |
| **Grade:** | Grade 5 |
| **Salary Scale:** | £22,659 - £25,482 |
| **Contract:** | OngoingPart time 0.6 FTE |
| **School/Department:** | Development Office |
| **Location:** | University of Kent, Canterbury campus |
| **Line manager:** | Operations Manager or their nominee |
| **Immediate line reports:** | N/A |
| **Anticipated start date:** | As soon as possible |

Job purpose

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| The purpose of the role is to manage the processing of all donations, including major gifts, keep an oversight of the funds by liaising with the Finance Department, Research office, KIE and other schools and departments, and help ensure effective and appropriate acknowledgement, donor receipts and reporting.This job will have a high impact on the ability of the University to retain and develop donors and the post holder is expected to work with a high level of autonomy in carrying out their duties. |

Key accountabilities

This section details the main accountabilities (or responsibilities) of the job, together with a selection of indicative duties. Other duties, commensurate with the grading of the post, may also be assigned from time to time.

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|  | Process philanthropic income to ensure prompt acknowledgement, donor receipts and reporting | *Frequency* |
| Daily |
| Example duties: |
| * 1. Administer financial mechanisms for philanthropic giving to the University, including CAF, direct debit, standing orders, credit cards, online donations, Justgiving, JustGive and text donations. Plus any new developments in giving.
 |
| * 1. Work with the Database Coordinator on the inputting of gifts onto Raiser’s Edge and the recording of pledges according to written policies and procedures.
 |
| * 1. Support the Operations Manager to develop and implement principles and procedures for the administration of philanthropic gifts of all types: cash, shares, property, gifts in kind.
 |
| * 1. Bank cheque and cash donations on regular basis.
 |
|  | Prepare Gift Aid claims for the University to maximise the leverage of philanthropic income | *Frequency* |
| Annually |
| Example duties: |
| * 1. Advise the Operations Manager on the wording of gift aid statements and pro-actively stay up to date with regulations pertaining to tax-efficient giving.
 |
| * 1. Identify discrepancies in Gift Aid status of donations on Raiser’s Edge and liaise with the Operations Manager.
 |
| * 1. Support the Operations Manager and Finance Department to submit Development Office Gift Aid claims.
 |
|  | Provide financial information and reports for stewardship purposes | *Frequency* |
| Monthly |
| Example duties: |
| * 1. Produce regular gift reports, tax receipts and bespoke fund reports for more complex donors such as corporate sponsors.
 |
| * 1. Create new funds, and support changes to Fund structures and gift agreement template as required.
 |
| * 1. Update the Fund Management Tracker as required.
 |
| * 1. Support the Planned Giving Officer in the management of legacy bequests and the wording of codicils.
 |
|  | Reconcile gift information between Raiser’s Edge and Agresso to ensure that both are accurate | *Frequency* |
| Monthly |
| Example duties: |
| * 1. Reconcile the University’s donations bank account on a monthly basis
 |
| * 1. Reconcile all philanthropic donations on Raiser’s Edge with Agresso on a monthly basis, ensuring accuracy and investigating un-reconciled gifts.
 |
| * 1. Highlight missing gifts to the Operations Manager.
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| * 1. Provide Agresso period numbers and tax claim numbers for adding to Raiser’s Edge donations.
 |
|  | Liaise with Schools and Departments on the management of designated and non-designated funds to ensure that they are disbursed appropriately | *Frequency* |
| Monthly |
| Example duties: |
| * 1. Pro-actively monitor giving to Schools and Departments, with the Major Gift Officers, in order to identify philanthropic income, and check income is being spent for the stated purposes.
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| * 1. Ensure donations are put into the right fund for ease of disbursement by Faculty/Departments.
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| * 1. Schedule payment of scholarships to students for various funds and liaise with the Income Office for payment of tuition fees.
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| * 1. To provide academic staff with financial information on philanthropic funds.
 |
|  | Administer University of Kent in America financial activities to ensure that we are aware of their activities | *Frequency* |
| Monthly |
| Example duties: |
| * 1. Process donations received, including cheques and online via JustGiving
 |
| * 1. Reconcile bank statements against records and forward any queries or discrepancies to the bank account holders.
 |
| * 1. Work with the UKA Treasurer to produce financial reports for University of Kent in America including board meetings.
 |
| * 1. Prepare tax information for University of Kent in America’s accountants and assist with queries.
 |
|  | Liaise with the Finance Department to ensure that gifts are correctly accounted for | *Frequency* |
| Daily |
| Example duties: |
| * 1. Liaise with Finance Department with regards to the creation of codes for new funds and management of existing funds.
 |
| * 1. Create journals for posting Direct Debits and Standing Orders on Agresso on a monthly basis.
 |
| * 1. Complete CAF vouchers, post to CAF and advise the Finance Department of amounts for entry on Agresso.
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| * 1. Advise Finance Department of coding and amounts processed by credit card for entry on Agresso on a monthly basis.
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Internal & external relationships

This section indicates with whom the job holder comes into contact and liaises/ communicates with on a regular basis, and for what purpose.

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| --- | --- |
| **Internal:** | Finance Department; Research Services; Kent Innovation & Enterprise, Faculty Staff (academic and administrative) |
| **External:** | Donors, Alumni; Professional organisations; Legacy advisors; US tax advisors, Members of UKA Board, particularly the Treasurer |

Health, safety & wellbeing considerations

This job involves undertaking duties which include the following health, safety and wellbeing considerations:

* Regular use of Screen Display Equipment

Person specification

The person specification details the necessary skills, qualifications, experience or other attributes needed to carry out the job. Applications will be measured against the criteria published below.

Selection panels will be looking for clear evidence and examples in an application, or cover letter (where applicable), which back-up any assertions made in relation to each criterion.

|  |  |  |  |
| --- | --- | --- | --- |
| **Qualifications / training** | Essential | Desirable | Assessed via\* |
| Degree or equivalent |  | **✓** | **A** |
| Professional accounting qualification or willingness to study for this qualification | **✓** |  | **A** |
| GCSE English and Maths or equivalent | **✓** |  | **A** |
| **Knowledge, skills and experience** | Essential | Desirable | Assessed via\* |
| Some experience in finance, preferably in accounting | **✓** |  | **A** |
| Experience of databases, preferably Agresso and Raisers Edge | **✓** |  | **A, T** |
| Experience of working in a fundraising organisation | **✓** |  | **A** |
| Experience of providing reports to donors |  | **✓** | **A** |
| Understanding of Development practices and procedures within Higher Education |  | **✓** | **A, I** |
| Experience of report writing |  | **✓** | **A, I** |
| Experience of monitoring key performance indicators |  | **✓** | **A, I** |
| Experience of working in cross-department teams | **✓** |  | **A, I** |
| Good IT skills, particularly Microsoft Office packages | **✓** |  | **T** |
| Good interpersonal, verbal and written communication skills | **✓** |  | **I** |
| Ability to work under pressure, to prioritise effectively and to manage a wide range of simultaneous and demanding tasks | **✓** |  | **T, I** |
| Ability to work in a target driven environment | **✓** |  | **A, I** |
| Highly numerate with a meticulous attention to detail | **✓** |  | **T** |
| Ability to be organised and use initiative | **✓** |  | **T** |
| Ability to work as a member of a team and work effectively with a Line Manager | **✓** |  | **I** |
| **Additional attributes** | Essential | Desirable | Assessed via\* |
| Commitment to deliver equality, diversity and inclusivity | **✓** |  | **I** |
| Commitment to Development Office values | **✓** |  | **I** |
| An analytical eye for problem solving | **✓** |  | **T, I** |
| Experience of dealing with pressured situations | **✓** |  | **I** |

\*Criterion to be assessed via:

A = application form or CV/cover letter

I = interview questions

T = test or presentation at interview