OXY
Occidental College

Gift Processing
Institutional Advancement

This position is responsible for entering and maintaining data in the development gift information system and associated forms, auditing the integrity of that data and researching discrepancies. This entails accurately entering the daily receipt of college gifts, running proof reports for each gift batch and completing deposits for entries as well as validating address information. This position also works on valuing and entering stock gifts and conferring with Treasurer's Office about the value and direction of these gifts. This position requires an individual who is highly detail oriented who can learn and comprehend a complex database with highly detailed policies and procedures. This position will also be responsible for maintaining constituent data as needed as well as running and checking acknowledgements, retrieving and batching web credit card gifts into a report in preparation for gift entry, and completing various administrative tasks as needed.

SUMMARY OF DUTIES, RESPONSIBILITIES AND GOALS

The following are essential job accountabilities:

Gift Processing
- Receive charitable donations for the college, including, but not limited to, check, cash, credit card, stock, bond, mutual funds, gift-in-kind, etc. and records into Banner on a daily basis, assuring that proper credit is given to the donor, codes and dates are accurate, all related Banner forms populated, and that the gift is posted to the proper campus account. Maintains electronic copy feed files. Assures that online, gift planning, calendar year end and fiscal year end gifts are posted according to gift policy.
- Will require recording of pledges for online recurring gifts or pledges from other sources. May be required to enter corporate, foundation, and governmental gifts for historical purposes.
- Responsible for timely processing and e-filing of all matching gift forms or online requests assuring that gift designation is in compliance with the corporation or foundation's company policy and all necessary paperwork or information required is completed. Assures that donors are given proper credit. Assures that entity credentials for online requests are up-to-date, making changes as necessary.
- Make daily deposits electronically and with college cashier and post all credit card transactions timely. Assures that postings balance with entered transactions.

Data Integrity
- Work closely with the Advancement Services staff to ensure an up-to-date and accessible database for IA.

- Works closely with the business office on all reconciliation issues.
- Assures that copies of residual data received from gift is forwarded to data coordinator, including, but not limited to donor employment information, e-mail address, web address, business and cellular phone numbers, etc.
- Make address changes from gift documentation and note any special information the donor wishes to appear in the final document.
- Assist and entry of specialized coding related to solicitation codes, campaigns, specific purpose codes, interests, and gifts and designations.

Reporting, Acknowledgements and Receipts
- Responsible for assembly and proofing of finalized acknowledgements/receipts daily. Also responsible for distribution of hard copies or e-mail PDF's to various departments making notations as requested by department; maintains acknowledgement routing instructions.
- May work closely with the business office to obtain new fund numbers. Assures proper college accounting of all types of gifts. Must also work with student accounts and annual giving to ensure that senior class gift transfers are handled in a timely fashion and that all students receive proper credit for their gifts. Works with athletic department for event-related gifts.
- May be responsible for producing, reviewing, and reconciliation against control reports.
- Coordination and use of reporting tools and data store to assess, report, and migrate gift data from outside sources.
- Troubleshoot Banner issues with ITS or Ellucian as well as audits information and corrects errors.

Other
- Potentially assist in document imaging and reconciliation of gift, scholarship, endowment, and planned gift documentation.
- Be able to train and have a good rapport with student worker. This position requires a strong working relationship with a student in order to meet the demands of the position as well as a good working relationship with the Department Services Coordinator.
- Must be able to clearly and concisely answer inquiries, either in person or on the phone, by donors, administrators or matching gift company officials regarding designation of gifts and giving history of donors to the college. Knowledge of CASE reporting and recording guidelines.
- Perform other duties as assigned.

This individual reports to the Director of Advancement Services

QUALIFICATIONS

Must have attention to detail and follow reporting rules that exist, but be flexible enough to adapt to a fast paced environment where coding evolves. Degree in accounting or related field preferred, or equivalent combination of experience and education. Minimum three years related experience and ability to work accurately and effectively with financial data. Knowledge of Word, Excel and database programs with facility for learning new software. Basic accounting skills required, and familiarity with development or fundraising preferred. Ability to handle large volumes of confidential data with speed and accuracy. Superior customer service demeanor, outstanding organizational skills, and ability to work effectively in a multi-task, deadline driven setting.

Please submit a resume and cover letter explaining how your qualifications meet the requirements of the position to **resumes@oxy.edu.**

As a condition of hire for a staff position and for appointment to a faculty position, Occidental College requires that all candidates who have received a conditional offer of employment complete an application form (if they have not already done so) and consent to a background check. Satisfactory completion of a background check, along with pre-employment verifications and references are required as a condition of employment, but only as permitted by federal, state, and local law, including the City of Los Angeles Fair Chance Initiative for Hiring Ordinance.

We will consider for employment all qualified Applicants, including those with Criminal Histories, in a manner consistent with the requirements of applicable state and local laws, including the City of Los Angeles' Fair Chance Initiative for Hiring Ordinance.