



Gift and Data Management Analyst

Institutional Advancement

Summary

This position is responsible for the maintenance and management of organizational data assets. This includes collecting and receiving data from disparate sources, maintaining and managing data in the development gift information system, auditing the integrity of that data to ensure completeness and accuracy based on downstream data systems, and researching discrepancies. Works with data providers to improve data management workflow. Interfaces with data end-users and the data management architecture team to ensure that systems meet business needs.

Performs work under minimal supervision. Provides leadership, coaching, and/or mentoring to a subordinate group (student workers). Possesses comprehensive knowledge of subject matter, including GAAP accounting principles, IRS regulations, and CASE Reporting Standards & Management Guidelines. Minimum three years related experience and ability to work accurately and effectively with financial data. Incumbent will be expected to continue upgrading knowledge, skills, and abilities needed to keep abreast of regulation/policy changes.

This position includes developing, implementing, and managing the pledge reminder system, as well as documenting policies and procedures, including business rules. This position 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 values and enters stock gifts and confers with the Treasurer's Office about the value and direction of these gifts. This position requires an individual who is highly detail oriented who can manage a complex database with highly detailed policies and procedures. This position will also be responsible for maintaining constituent data, running and checking acknowledgements, retrieving and batching web credit card gifts into a report for gift entry, and completing various data management tasks and projects.

Competencies: Ability to foster teamwork. Analytical thinking skills. Technical expertise. Computer skills. Detail oriented. Ability to meet deadlines. Project management skills.

Essential Responsibilities

Gift Processing

- Process charitable donations for the college, including, but not limited to, check, cash, credit card, stock, bond, mutual funds, gift-in-kind, etc. and record 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 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 in a timely manner. Assures that postings balance with entered transactions.
- Document policies and procedures, including business rules, for gift processing and data management.
- Develop, implement, and manage pledge reminder system.

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 the gift are forwarded to Sr. Coordinator of Data Management, 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.
- Enter specialized coding related to solicitation codes, campaigns, specific purpose codes, interests, and gifts and designations.
- Responsible for assembling and proofing finalized acknowledgements/receipts daily. Also responsible for distribution of hard copies or email PDF's to various departments making notations as requested by department; maintains acknowledgement routing instructions.
- 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 the athletic department for event-related gifts.

- Responsible for producing, reviewing, and reconciling 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.
- Prepare gift, scholarship, endowment, and planned gift documentation.
- Train and manage student workers. 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 Senior Coordinator of Data Management.
- 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.
- Perform other duties as assigned. This individual reports to the Senior Coordinator, Data Management.

Qualifications

Required

- 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.
- Must possess and demonstrate strong spelling, grammar and math skills.
- Familiarity with biographic and gift data and data processing (highly preferred).
- Able to handle a high volume of work, changing priorities and constant interruptions..
- 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.

Preferred

- Able to work quickly and accurately with detail in a busy environment with frequent calculating, a variety of interrelated tasks and sustained concentration.
- 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.

APPLICATION INSTRUCTIONS

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

Additional Information:

Occidental is an Equal Opportunity Employer and does not unlawfully discriminate against employees or applicants on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, pregnancy, breastfeeding or related medical condition, national origin, ancestry, citizenship, age, marital status, physical disability, mental disability, medical condition, genetic characteristic or information, military and veteran status, or any other characteristic protected by state or federal law. Occidental is strongly committed to increasing the diversity of the campus community and the curriculum, and to fostering an inclusive, equitable, and just environment within which students, staff, administrators, and faculty thrive. Candidates who can contribute to this goal through their work are encouraged to identify their strengths and experiences in this area. Individuals advancing the College's strategic equity and justice goals and those from groups that are underrepresented in the field are particularly encouraged to apply.

Salary is commensurate with experience and qualifications. A comprehensive benefits package is available that includes: excellent health, dental, life, and retirement benefits; tuition benefits for the employee, spouse, domestic partner, and dependents; additional extras including use of gym facilities and the College Library. For a detailed description of benefits, please visit <https://www.oxy.edu/offices-services/humanresources/benefits-information>.

All qualified applicants will be considered for employment, 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.

Occidental College is committed to working with and providing reasonable accommodations to applicants with qualifying disabilities. If you need a reasonable accommodation because of a disability for any part of the application or employment process, please contact Human Resources (hr@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.