WESTMONT COLLEGE

Gift Processing Specialist- 40 hours per week
Advancement Services

Position Summary:
Responsible for accurate transaction recording (gift and non-charitable transactions) and receipting. Through the use of tools like Salesforce, the Gift Processing Specialist also helps develop innovative approaches to handle these core responsibilities at volume (approx. 12K gifts/year plus several thousand non-charitable transactions for OCA).

Qualifications:
Requirements include: BA, personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations; a minimum of four years’ experience with computer systems, relational databases and Microsoft Office Suite; in-depth knowledge of complex gift entry; excellent computer skills and ability to learn and adapt quickly to new software; accurate keyboarding skills; strong organizational skills; strong verbal and written communication skills; ability to prioritize in a multi-tasking; fast-paced environment; ability to manage multiple projects under strict time constraints and while exhibiting flexibility; strong proofreading and editing skills and attention to detail; ability to maintain confidentiality; proven ability to work independently as well as on a team. Some experience using Salesforce, and processing gifts in the higher education arena desirable.

Responsibilities:
The Senior Gift Processing Specialist is a member of the fundraising team. While not making asks of donors, the role serves donors with helpful systems and accurate information. Division of duties is approx. 25% between: designing systems that serve donors (Salesforce and other applications), ensuring accuracy of data entry, processing data and transactions, and overseeing a team of student employees and volunteers

- Process a minimum of $9,000,000 in gifts, pledges, securities, in-kind gifts, deferred gifts annually in Salesforce. Promptly process gifts and pledges following established procedures, including those made via on-line giving page, credit card, and electronic fund transfer, etc.
- Maintain and produce all receipts, letters and acknowledgements generated by gift entry. Maintain pledges on the system; produce reminders, including campaign pledge reminders; provide needed backup to the business office.
- Work closely with the office of the Vice President for Finance in the booking of transferred stocks/securities. Coordinate and collaborate with the business office to ensure monies are accurately deposited in GL accounts.
- Add and update biographical data received as part of gifts sent to college.
- Prepare daily reconciliation of checks, cash and charges and run transmittal reports for business office; transmit entered gifts to college’s Colleague financial system.
- Create gift designations in Salesforce and work with the business office to create the corresponding GL account.
- Become conversant with CASE Management Reporting Standards, IRS substantiation regulations and FASB standards. Work closely with staff to maintain proper procedures and ensure posted gifts and pledge entries are in compliance with necessary standards.
- Oversee completion of corporate matching gift forms; including submitting, tracking and copies.
- Produce daily, weekly, and ad hoc gift reports as needed. Order and maintain supplies needed for receipts, envelopes, and inserts. Ensure that all printed GP materials are accurate and high quality.
- Provide training as necessary for advancement staff to assist with gift processing.
- Develop and maintain cooperative relationships with all Advancement staff to ensure timely processing of all gifts and pledges. Maintain a current Gift and Pledge Processing procedures manual including college specific business practices.
- Assist in the development of donation management policies and procedures.
- Maintain the highest level of integrity when communicating information to others and working with sensitive and confidential information.
- Supervise student workers as needed.
- Expectations for workplace demeanor include but are not limited to: working collaboratively and harmoniously with coworkers, customers and others by sharing ideas and resources willingly, constructively and positively; listening to and objectively and respectfully considering the ideas and perspectives of others; readily admitting and correcting personal mistakes; meeting commitments; keeping your supervisor and others who may be affected informed about work progress; addressing problems willingly and constructively to discover practical and lasting solutions acceptable to all parties; working promptly toward reconciliation and forgiveness during conflict; respecting the diversity of our community in words and deeds. Westmont expects employees to avoid themselves wherever necessary, demonstrating flexibility and openness to new requests and responsibilities in order to foster an environment of collaboration.
- Other duties as assigned.

Please note that a large portion of this role requires training and duties on campus.

Reports to: Business/Systems Analyst for Advancement

10.20