



# OTTERBEIN UNIVERSITY

## Job Posting

**Job Title:** Gift Administration and Bio Records Specialist

**Job Class:** Staff

**Department:** Advancement Services

**Reports to:** Executive Director, Annual Giving and Advancement Services

**FLSA status:** ¾ time/non-exempt/ 12 months/30 hours

**To Apply:** Please email an [Otterbein Employment Application](#), resume and cover letter to [hr.jobs@otterbein.edu](mailto:hr.jobs@otterbein.edu) addressing this position in the subject; FAX 614-823-1511; or mail to Otterbein University, Human Resources, 1 South Grove Street, Westerville, OH 43081. Only submissions with a completed application will be reviewed.

**For an Otterbein Employment Application or more information:** Please visit <http://www.otterbein.edu/Careers>

**BENEFITS** at Otterbein include: tuition benefits for employees and their dependents, 4 weeks of vacation, 11 paid holidays, medical, dental, vision, and competitive employer contributions to a 403(b) retirement plan.

**SUMMARY:** The Gift Administration and Bio Records Specialist is responsible for processing gifts, ensuring timely acknowledgment of our donors, and transfer of information to the finance office. S/he oversees the transfer of endowment information into our Millennium database, reviews all gift agreements (endowed and restricted), corresponds with endowment contacts/restricted gift donors, and works with admissions, financial aid and University departments to ensure compliance with gift agreements.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

- Communicates with Director of Advancement Services to ensure accurate processing of gifts and to ensure financial integrity and accuracy.
- Coordinates and prioritizes day-to-day gift processing activities; accurately processes checks, credit cards, and electronic funds transfers for unrestricted and restricted gifts, including all Alumni Relations deposits and expenditures.
- Reconciles batches with Millennium and prepares batches for daily deposit.
- Oversees preparation of weekly feed to the business office and works collaboratively with that office to ensure balance.
- Prints/distributes receipts and oversees mailing of same.
- Reconciles and distributes daily, weekly, and monthly reports.
- Creates endowment records; updates existing records.
- Assists the Executive Director, Advancement Services and Annual Giving in preparing and reviewing aggregated gift information for discussion with finance.
- Maintains confidentiality regarding all gifts to the University and other office assignments.
- Enters and updates actions/tasks on constituent records; creates and updates proposal rows in Millennium.

- Using the Data Examiner, approves new constituents for Gifts and Events. Accepts and appends new constituents (graduates, parents) and establishes a Millennium record for each.
- Completes timely review of AdvInfo.
- Enters information received on constituents (both corporate and individual) into the data base.
- Searches for new addresses, phone numbers and other biographical information as well as lost Alumni using search engines, and other on-line resources.
- Understands and is able to operate a multi-line phone system and receive guests
- Copies, collates and distributes a variety of written materials.
- Performs other related duties as assigned by executive director.

#### **SUPERVISORY RESPONSIBILITIES:**

**QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE:** High School diploma required, bachelors preferred; five years of general clerical experience required. Prior experience in data entry and computer systems, particularly in a higher education setting, preferred.

#### **MISSION CRITICAL COMPETENCIES**

##### **COMMUNICATION SKILLS:**

- Demonstrates active listening skills.
- Organizes ideas in a clear, logical flow that can easily be understood.

##### **CUSTOMER SERVICE:**

- Makes customers and their needs a primary focus of actions.
- Readily readjusts priorities to respond to pressing and changing customer demands.
- Ability to develop and maintain strong relationships, trust, and credibility with the customer.

##### **INITIATIVE:**

- Seeks opportunities to improve, streamline, reinvent work processes as a means to improve the organizations performance and effectiveness.
- Thinks expansively by combining ideas in unique ways or making connections between disparate ideas and priorities.
- Targets important areas for innovation and develops solutions that address meaningful work issues.
- Adapts best practices and processes to the department.

##### **ACCOUNTABILITY:**

- Respects confidentiality of information.
- Demonstrates a strong sense of urgency about solving problems and getting work done.

**CERTIFICATES, LICENSES, REGISTRATIONS:** N/A

**LANGUAGE SKILLS:** Must demonstrate excellent verbal and written English skills including grammar.

**MATHEMATICAL SKILLS:** Must be competent in general math.

**TECHNICAL SKILLS:** Knowledge of general office procedures. Strong interpersonal skills. Must take pride in and be thorough in quality of work produced; must be able to use general office equipment including office PC, copier, telephone, scanner, etc.

**REASONING ABILITY:** Must possess excellent attention to details. Must possess strong organizational skills.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to talk or hear, sit, reach and use repetitive motions of hands and wrists. The employee is occasionally required to stand, walk, stoop or bend. The employee must occasionally lift and/or carry up to 20 pounds and occasionally push and/or pull up to 20 pounds. This position requires close vision. Must be able to meet regular and predictable attendance standards.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Duties are performed in an environmentally controlled office setting.

*This description is intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.*

**Otterbein University is an Equal Opportunity Educator and Employer.**

Otterbein University is committed to providing a welcoming environment free from unlawful discrimination. To this end, the University prohibits any form of discrimination against any person on the basis of race, color, sex, gender, pregnancy, religion, creed, marital status, partnership status, age, sexual orientation, gender identity, gender expression, national origin, disability, military status, or any other legally protected status in its programs and activities. However, the University's commitment to a nondiscriminatory environment is not intended to abridge unduly its commitment to academic freedom, free speech, or its educational mission. Inquiries or complaints regarding any form of discrimination or harassment may be directed to:

Scott Fitzgerald  
Director of Human Resources and Legal Affairs  
Title IX Coordinator  
614.823.1130  
[sfitzgerald@otterbein.edu](mailto:sfitzgerald@otterbein.edu)