

Job Code:	JC100224
Job Category:	Support Staff
Original Date:	December 2019
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Pay Group:	24

CLASS SPECIFICATION

ADMINISTRATIVE LEAD, PHILANTHROPY AND ALUMNI RELATIONS

NATURE AND SCOPE OF WORK

As a senior role providing administrative support to the Director and the Philanthropy & Alumni Relations PAR department, the Administrative Lead is responsible for planning, implementing, and monitoring processes and services to ensure the smooth operations of the department. The incumbent provides exceptional and broad administrative support. Under limited supervision, this role's primary responsibilities cover operational oversight including managing projects, scheduling, and managing calendars, timelines, and processes, acting as a communications center point for the PAR department, and creating financial and CRM reports for the Director's use. The incumbent will work with a variety of stakeholders both internal and external to ensure the PAR department has the information it needs to move projects forward and achieve Foundation and University's goals. A focus will be on efficiency and continuous quality improvement. Reporting directly to the Director, the role requires high levels of tact, diplomacy, and confidentiality.

ILLUSTRATIVE EXAMPLES OF DUTIES

Operations/Administrative Support

- Supports and manages activities that fall under the jurisdiction of the Director, including daily operational processes, such as office scheduling and calendar management.
- Maintains an in-depth knowledge of the Director's projects, priorities and objectives.
- The position provides front line customer service to donors, sponsors and alumni, in support of the PAR department's engagement and fund development goals.
- Interacts with the President's Office and other administrators to relay information, and coordinate their involvement in engagement, fundraising meetings and events activities.
- Facilitates PAR meetings by booking facilities, audio/visual, preparing information, agendas, action items for related PAR meetings.

- Maintains and updates financial, action and bio information in CRM database for the Director and VP of University Relations.
- Collaborates with the Data Analyst to ensure that all donations to the Foundation are processed, recorded in the CRM, and receipted in an accurate and timely manner.
- Works collaboratively with the Data Analyst to prepare and provide accurate, timely reporting for the Director.
- Collaborates with PAR team members to ensure project timelines are achieved by tracking progress of tasks and responsibilities of those involved within the project, follows up when required and escalates issues as necessary. Uses excellent judgement and ability to prioritize to maintain project timelines.
- Manages a complex and changing calendar for the Director. Adhering to University protocols and judgement prioritizes meetings that align with the Director's and University's strategic priorities.
- Contributes to the agenda setting for PAR department meetings. Actively participates and ensures that information is disseminated to appropriate internal or external stakeholders following meetings.
- Provides support for internal and external committees including meeting agendas, minutes, communication, and logistics. Ensuring information is disseminated to appropriate stakeholders following meetings. Responsible for identifying the deliverables from such meetings that fall within the classification and acting on them.
- Research, compiles, and submits information regarding topics or issues requiring Director's attention. Maintains departmental statistics as appropriate for future decision-making purposes.
- Takes on ad hoc projects at the request of the Director. Oversees onboarding/orientation for department and coordinates office and technology additions and moves with IT and Facilities if necessary.
- Sets up and maintains a variety of departmental records hard copy and digital file management including CRM database. Contributes and makes recommendations to improve procedural elements of departmental recordkeeping.

Communications Hub

- Acts as a central point of contact between the Director and other University Departments.
- Manages list development and segmentation in CRM for cultivation, stewardship and seasonal donation appeal communications to constituents.
- Effectively communicates decisions, directives and important information following meetings to the appropriate individuals and PAR team members.

Financial

- Tracks, monitors and reconciles budgets including reviewing management reports, and contacting Financial Services as required. Resolves discrepancies or using judgement and discretion brings them to the attention of the Director.
- In collaboration with the Data Analyst works to reconcile PAR CRM and Finance reporting.
- Has signing authority within university guidelines.
- Coordinates the development and preparation of the annual operating budget and the operational plan materials for the Director
- Monitoring, assessing, analyzing and reporting on the operating unit's budgets.
- Monitoring purchasing practices to ensure adherence to Institute policies, practices, and procedures.

Data Analysis

- Supports data analysis extracted from the Blackbaud NXT CRM, including collecting, compiling and verifying financial and bio data for Foundation or University Relations reporting requirements. .
- Utilizes information provided from other PAR colleagues departments, faculties and programs and information available on departmental reporting systems (e.g. Banner, Argos, MS Access) to synthesises data and create reports and summaries as required to support the Director in data-driven decision making.
- Using established criteria runs reports , in collaboration with the PAR Data Analyst on internal performance indicators for data-driven decision making and forward planning.
- Liaises with other departments, faculties and programs to obtain the information requested by the Director.

Other

- Takes initiative, solves problems and determines course of actions for issues under this class specification and then follows through independently, occasionally consulting with the Director with reference to new or complex problems.
- Provides support within the requirements of this class specification to other administrators as required.
- May be required to take training and act in the capacity of a floor warden as part of the University's Emergency Preparedness Plan (fire, earthquake, WHMIS).
- Performs other duties related to the qualifications and requirements of the position.

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Thorough knowledge of MS Office applications including Outlook, Word, Excel, Teams, and PowerPoint. Experience utilizing social media platforms in a professional environment. Ability to learn multiple University systems.
- Considerable knowledge of financial and CRM database management systems specific to this field such as NXT, Banner, etc.
- Considerable knowledge of business communication writing including donor stewardship, internal communication and meeting minute writing. Strong command of written and verbal communication skills at a senior professional level.
- Advanced ability to understand the context of issues in order to exercise initiative and judgement regarding action required.
- Knowledge of financial reporting practices including preparing and administering budgets. Basic financial analysis abilities an asset.
- Ability to maintain confidentiality and to exercise tact, diplomacy, discretion and sensitivity when dealing with other employees, students, community groups, donors and the general public.
- Ability to understand and follow complex oral and written instructions, and communicate information effectively, both verbally and in writing, and appropriately to the intended audience and with correct emphasis and tone.
- Ability to apply exceptional organizational skills and basic project management principles to meet deadlines. Ability to adjust timelines to account for changing priorities and resources while meeting deadlines in a fast paced environment. Ability to maintain attention to detail with constant interruption.
- Ability to answer questions regarding university and area policy and procedure, and collective agreements up to a defined level on behalf of the administrator.
- Ability to work as part of a team, be flexible and adaptable, with a can-do attitude to further PAR team objectives.
- Keyboarding speed of 50 wpm.

REQUIRED TRAINING AND EXPERIENCE

- Completion of a bachelor's degree in a related discipline.

- Five years of directly related and progressively senior administrative support experience, including experience in an educational setting.
- Fundraising administrative experience an asset.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS

- None