THE UNIVERSITY OF OKLAHOMA
FOUNDATION

DONOR SERVICES SPECIALIST

POSITION SUMMARY:

Reporting to the Assistant Director of Compliance & Donor Services, this position is responsible for providing customer service to University staff – fund sponsors, business managers, and administrators – and assisting and advising Foundation and Advancement staff with fund-related questions and issues. Provides internal team technical expertise for 1) fund agreements and financial information, 2) fund utilization metrics, and 3) IT and gift accounting tools, processes, and procedures.

KEY RESPONSIBILITIES:

Knowledge Management and Generation

- Manage data coding processes in fund accounting and other data tables to ensure data integrity for fund review processes.
- Establish and manage information tracking processes for quarterly fund review reports in university units. Elicit feedback from team members to identify ways to improve data management. Liaise with the IT and Gift Processing teams to implement any valid process changes.
- Liaise with the Gifts Accounting and IT teams to ensure financial data points are correct and useful to University and Donor Relations efforts. Ensure that digital reports are created from correct data points in constituent or accounting data warehouse tables.
- Perform research as requested or required – fund agreements, trends in fund use – for internal, Foundation, Advancement or University teams.
- Manage workflow and tracking processes for inter- and intra-team projects.

Customer Service & Compliance

- Provide thorough, accurate, and timely responses to all internal and external stakeholder requests for information and demonstrate exemplary customer service in all exchanges.
- Assist Assistant Director of Compliance & Donor Services with reporting, fund level stewardship, donor events, broad based communication, and donor recognition.
- Work with campus partners to review gift funds on continuous basis and ensure appropriate use in accordance with fund's purpose.

Leadership

- Contribute to strategic input for policies, procedures and process improvements through cross-team collaboration and participation.
- Build relationships with Advancement and other University colleagues to advance strategic initiatives in each unit.
- Take a team-oriented approach to problem solving and troubleshooting.
- Take responsibility for continued learning and participate in peer continuing education opportunities that inform evolving best practices.

- Perform related responsibilities as required or assigned.

REQUIRED QUALIFICATIONS:

Knowledge, Skills, Abilities

- Excellent communication skills, both written and oral, that emphasize a customer focus.
- Ability to work independently without close oversight.
- Team player who productively engages with others at varying levels inside and outside the organization.
- Ability to meet multiple deadlines and priorities without sacrificing desired results.
- Highly analytical with the ability to assess and interpret detailed quantitative data.
- Flexible, open and receptive to new information, ideas and approaches. Seeks and acts upon performance feedback.
- Proficient in use of the MS Office Suite and the Internet.
- Competent in tools, software, and technologies to effectively complete assignments and job tasks.
- Seeks to grow in role and welcomes expanded opportunities.
- Basic technical knowledge of fund raising in an educational or non-profit environment.
- Ability to produce work and reports with precision and attention to detail.

Education/Experience

- Bachelor's Degree in a related discipline or equivalent combination of education and experience.
- 1-3 years of compliance reporting related to development, fund research, fund utilization and/or donor relations work, preferably in a university environment.

SALARY RANGE:

Salary commensurate with experience.