

# Job Description

<b>Job Title:</b>	Advancement Coordinator
<b>Department:</b>	Dean of Mathematics Office
<b>Reports To:</b>	Manager, Advancement Operations
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 6
<b>Effective Date:</b>	August 2023

## **Primary Purpose**

Reporting to the Manager, Advancement Operations, the Advancement Coordinator provides a full range of administrative and project support to the Math Advancement team. The Advancement Coordinator is considered a key central resource to the leadership team and the Faculty of Mathematics for matters regarding alumni, individual, corporate and foundation partnerships/philanthropy, and is responsible for ensuring data integrity and reporting for Math Advancement.

## **Key Accountabilities**

### **Administrative**

- Provides high-level administrative support for the department, ensuring that tasks are completed in a timely manner.
- Works with the Manager, Advancement Operations to communicate and triage administrative priorities to the Director, including an analysis and assessment of how priorities are established, and what follow up actions are required.
- Coordination and execution of the Director, Advancement's travel itinerary for bookings, calendar arrangements, event venue research and bookings, and ensuring that necessary preparations and materials are in place according to the needs of the event in an appropriate timeline.
- Coordinates travel arrangements, itineraries, and expenses for Math Advancement visitors and alumni.
- Assist in the development of departmental processes, recommending changes to operational procedures to improve efficiencies and supports the Manager, Advancement Operations with identified continuous improvement projects.
- Responsible for the creation and maintenance of standard operation procedures documentation of the Advancement Coordinator role.
- Coordinates & edits scholarship and sponsorship agreements and ensures the necessary approvals are obtained, in consultation with other units, as needed. Liaises with Student Awards & Financial Aid (SAFA) on technical questions related to scholarship agreements.
- Responsible for records retention of all Math Advancement gift agreements, MOU's, and proposals.
- Works with the advancement team and/or Faculty Events Manager to provide logistical support and coordination for the department's special events, alumni visitors, and working closely with other departments on campus.
- Orders and manages all online requests to WStore, WPrint and Creative Services for Math Advancement promotional materials and branding documents and department supplies.
- Prepares expense claims in Concur on behalf of the Math Advancement team for submission.
- Responsible for ordering office supplies and catering requests on behalf of the team.
- Responsible for reconciling monthly purchasing card expenses and ensuring appropriate accounts and work orders are used, while following appropriate Faculty of Mathematics procedures, and university policies.

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- Develops briefing notes and packages for the Math Advancement Team and other senior University Administrators such as the Dean of Math or VP Advancement who may be meeting with a prospect.
- Mines database (Raiser's Edge) for research to prepare meaningful reports in support of the briefing notes.
- Prepares meeting agenda's, room bookings and takes meeting minutes for the Math Advancement Team.

### **Advisory**

- Acts as the primary contact for the Associate Directors, and Math Advancement team, establishing and managing priorities for inquiries and redirecting/forwarding when appropriate. Ensures that departmental values are upheld, and that information being provided is consistent and accurate.
- Assists the Manager, Advancement Operations with the recruitment and onboarding/offboarding of co-op students each term.
- Work with the Donor Relations Officer to support the development and implementation of the first-class donor relations program to complement the objectives of the overall fundraising goals of the Faculty.
- Manages the implementation of donor relations communications, thanking alumni for their donations, and informing donors of their annual scholarship recipients.
- Acts as a contact for Development Officers to address questions about donor funds, schedule student/donor meet and greets, and function as the liaison between SAFA undergrad and graduate awards officers.
- Provides superior customer service to internal and external stakeholders.

### **Data Integrity and Reporting**

- Oversight and data entry for multiple databases, collaborating with other stakeholders to ensure the accuracy and integrity of all records in accordance with University records management and retention policies, and legislative requirements if needed.
- Runs and distributes a variety of reports using Raiser's Edge (RE) to support the fundraising function and requests updates to RE data and reports, as required, to ensure records are up to date with central advancement.
- Ensuring all gifts are acknowledged properly, and maintaining accurate, up to date, RE records of donors' stewardship activity and reporting metrics.
- Submits clearance requests/updates, Advancement Tracker RT submissions on behalf of the team.
- Enters RE status/meeting notes as required; ensures notes are current as well.
- Performs research needed for various departmental and compliance documents, including the Annual Business Plan, and creates presentation materials and statistical reports for the Director, Advancement.
- Prepares reports to monitor the progress of department's fundraising campaigns.
- Upkeeps several Airtable databases for department use.

## **Required Qualifications**

### **Education**

- University degree or equivalent combination of post-secondary education and/or experience will be considered.

### **Experience**

- 3-5 years in an administrative role, providing support to a large and cross-functional team is preferred.
- Knowledge of philanthropy and fundraising is an asset.

### **Knowledge/Skills/Abilities**

- Proficient/exceptional experience with the Microsoft Office suite of products, including: Outlook, PowerPoint, Excel, and Word.

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- Intermediate knowledge and experience with Raiser's Edge would be considered a strong asset.
- Basic experience with Airtable would be considered an asset.
- Proven ability to build strong relationships and influence individuals at all levels of an organization, as well as external partners.
- Independent judgement in areas of time management, task prioritization and decision-making.
- Collaborative team player comfortable with the intake of information from a variety of sources and organizing for optimal storage and use.
- Demonstrated ability to successfully operate in a multi-stakeholder and complex environment.
- High level of maturity and empathy; dealing with sensitive and confidential information with sensitivity and integrity.
- Demonstrated ability to work independently and thrive in a fast-paced, entrepreneurial environment, effectively managing complex competing priorities while maintaining a high degree of accuracy, quality of work, and attention to detail.
- Strong technical skills related to data storage and organization, and ability to manage complex detailed work.
- Knowledge of the University's policies, procedures and operating requirements, and the academic culture on campus.
- Strong initiative with the ability to anticipate the needs of the Math Advancement team.
- Proactive and highly resourceful.
- Superb time management skills with a demonstrated ability to effectively set priorities, identify problems and recommend appropriate solutions.
- Strong communication skills (both verbal and written).
- Exceptional interpersonal skills with strong customer focus, sensitivity to diversity and excellent judgement on confidential issues.
- Ability to foster positive relations and manage a range of relationships.
- Ability to contribute as a team player, projecting a positive, professional, courteous, and congenial attitude.
- Initiative, confidence, ability to troubleshoot and problem solve.
- Experience with Concur, Raiser's Edge, SharePoint experience would considered a strong asset.

### Nature and Scope

- **Contacts:** Communicates regularly with stakeholders across campus from all levels of the organization, representing the department with strong interpersonal skills and a focus on client service. Sensitivity to the diverse student and staff population on campus, often working with confidential and sensitive information requiring a mature and professional demeanor.
- **Level of Responsibility:** This position has specialized work with limited supervision from the Manager, Advancement Operations, and acts in collaboration with the advancement team.
- **Decision-Making Authority:** Makes decisions regarding scheduling and travel on behalf of the Math Advancement team. Handles departmental inquiries, ensuring that only critical issues are escalated to senior management. Involved in decisions relating to the administration and reporting of the Math Advancement team including changes to systems and work processes. This position can make independent decisions and works collaboratively with the Math Advancement team. Makes independent event-based decisions on timing, location based upon knowing the objectives and constituents associated with the event here on campus and elsewhere around the world. The incumbent makes regular information-based decisions using sound judgment and the collaboration of other team members. Independently creates departmental communication to other departments on campus regarding new scholarships and sponsorships. Independently assesses which endowment reports need further research by liaising with Central Advancement, Finance Officer, SAFA, and others.

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- **Physical and Sensory Demands:** This position works independently, responding to a high volume of inquiries and requests for information, maintaining composure and a strong work ethic to coordinate the various demands, competing, and changing priorities, and interruptions. Some flexibility in working hours and overtime may be required. Extended time at a computer.
  - **Working Environment:** Typical environmental factors related to a busy office environment. Maintains strong interpersonal relationships with other team members, and professional relationships with other departments on campus. Fosters professional and trusting relationships with external partners and stakeholders.