

## JOB INFORMATION

Effective Date	7/17/2023
Job Code:	3811
Job Title:	Development and Stewardship Assistant
Salary Grade/Structure:	040 - Admin-Professional
Career Level Name:	P1 - Entry Professional
FLSA Name:	Exempt
EEO Code:	30-Professional Non-Faculty
Job Function:	Development
Job Family:	Fundraising
Job Summary	The Development and Stewardship Assistant will accept, review and process all donor-gifts to UHCL daily. Frequent function includes quality control of gift documentation, identifying gift cost centers between UHCL and the UHS Advancement Services office, deposits, and journal entries. Research donors, enter new entities into CRM, ensure processes are completed that support gift acceptance; support the UA team with donor stewardship activities and special events functions as needed. Daily work with PeopleSoft and Donor CRM.

## COMPETENCIES

### Competencies

Please refer to the [UHCL Human Resources webpage](#) for UHCL core competencies for all eligible job levels.

## QUALIFICATIONS

### Education

Education Level	Education Details	Required/Preferred	
High School Diploma or GED		Required	
Associate's Degree		Preferred	

### Work Experience

Experience	Experience Details	Required/Preferred	
Less than 3 yrs	Minimum two years of experience in Accounts Receivable processing, digital filing, project management, and record keeping.	Required	
Less than 3 yrs	Three years of customer service experience managing interactions from start to completion.	Preferred	

## Licenses and Certifications

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Preferred	
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## Knowledge, Skills and Abilities

KSAs	Proficiency
<ul style="list-style-type: none"> <li>Manage projects to ensure meeting deadlines - follow up as appropriate and set guidelines for ensuring goals are met.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Working knowledge of record keeping and ability to develop and maintain organized work.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Working knowledge of office accounting and book-keeping processes.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Must be able to use Microsoft Office products including Word, Excel, Outlook and PowerPoint.</li> </ul>	Proficient
<ul style="list-style-type: none"> <li>Ability to learn and effectively use PeopleSoft, software similar to QuickBooks, and donor databases.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Must be an effective communicator with excellent oral and written communication skills.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Must be able to quickly understand work processes and how to identify problems for resolution.</li> </ul>	Skilled
<ul style="list-style-type: none"> <li>Must be an independent problem-solver and must possess time management skills to work effectively with supervisors.</li> </ul>	Basic

## JOB RESPONSIBILITIES

- Campus Security Authority
- Remote Work Capable

## Essential Functions

Essential Function	% TIME
<ul style="list-style-type: none"> <li>Research donor gift history in the CRM to ensure correct designations, cost centers, and stewardship treatment. Create journals for moving gifts.</li> </ul>	15%
<ul style="list-style-type: none"> <li>Utilize PeopleSoft and CRM to run gift reports, budget reports, and crosscheck CRM for accuracies or identify problems. Collaborate with UHS Gift Office on discrepancies</li> </ul>	15%
<ul style="list-style-type: none"> <li>Use appropriate cash handling processes when verifying cash, check and credit card payments.</li> </ul>	15%
<ul style="list-style-type: none"> <li>Prepare and process digital gift transmittals accurately for approval.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Facilitate creation of UHCL cost centers and integration with UHS designations. Give instructions for deactivation process as needed.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Prepare and process daily deposits through the university Business Services office.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Prepares and processes accounting documents including requisitions, purchase orders and vouchers to support key team members in University Advancement.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Perform stewardship duties: contact and record donor communications; assist with special events activities and occasional donor correspondence.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Other related duties as assigned.</li> </ul>	5%

## PRE-EMPLOYMENT

MVR:	No
Criminal History:	Yes
Physical Exam:	No
Hearing Exam:	No
Pulmonary Function Test:	No

## PHYSICAL DEMANDS/WORKING CONDITIONS

Office and Administrative Support

### Physical Demands

Physical Demand	N/A	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting					X	
Lifting		X				
Carrying		X				
Pushing		X				
Pulling		X				
Climbing		X				
Balancing		X				
Stooping		X				
Kneeling		X				
Crouching		X				
Crawling		X				
Reaching		X				
Handling			X			
Grasping			X			
Feeling		X				
Talking					X	
Hearing					X	
Repetitive Motions				X		
Eye/Hand/Foot Coordination				X		

### Working Environment

Working Condition	N/A	Rarely	Occasionally	Frequently	Constantly
Extreme cold		X			
Extreme heat		X			
Humidity		X			
Wet		X			
Noise			X		
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

### Travel Requirements

Estimated Amount	Brief Description