

JOB INFORMATION

Effective Date	4/30/2024
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"> Manage projects to ensure meeting deadlines - follow up as appropriate and set guidelines for ensuring goals are met. 	Skilled
<ul style="list-style-type: none"> Working knowledge of record keeping and ability to develop and maintain organized work. 	Skilled
<ul style="list-style-type: none"> Working knowledge of office accounting and book-keeping processes. 	Skilled
<ul style="list-style-type: none"> Must be able to use Microsoft Office products including Word, Excel, Outlook and PowerPoint. 	Proficient
<ul style="list-style-type: none"> Ability to learn and effectively use PeopleSoft, software similar to QuickBooks, and donor databases. 	Skilled
<ul style="list-style-type: none"> Must be an effective communicator with excellent oral and written communication skills. 	Skilled
<ul style="list-style-type: none"> Must be able to quickly understand work processes and how to identify problems for resolution. 	Skilled
<ul style="list-style-type: none"> Must be an independent problem-solver and must possess time management skills to work effectively with supervisors. 	Basic

JOB RESPONSIBILITIES

- Campus Security Authority
- Remote Work Capable

Essential Functions

Essential Function	% TIME
<ul style="list-style-type: none"> Research donor gift history (contact donor as needed for intent, coordinate with GPR, Accounting and Development team to ensure CRM designations and PS cost centers are valid; recommend and proceed with actions to make corrections; propose process changes to supervisor and ED for improved functions; create journals for moving gifts. 	15%
<ul style="list-style-type: none"> Utilize PeopleSoft and CRM to run detailed gift reports for reconciliation against managed fiscal year gift logs, run and monitor budget reports, and crosscheck CRM to log and correct errors. Use available financial and CRM tools for quality control on termed basis (daily, weekly, etc.) as required for specific reporting needs; identify and relay corrections to UHS Gift Office and monitor completion; instruct endowment office and coordinate with Treasury on endowment gifts; keep complete records of these actions in digital format for future reference and audit purposes. 	15%
<ul style="list-style-type: none"> Use appropriate cash handling processes when verifying cash, check and credit card payments. Coordinate with fundraisers to ensure proposals and pledges are recorded, corrected and tied to cash/gifts processes. 	15%
<ul style="list-style-type: none"> Perform stewardship duties: contact and record donor communications; assist with special events activities and occasional donor correspondence. 	15%
<ul style="list-style-type: none"> Prepare and process digital gift transmittals accurately for approval. Research and identify incorrect GTFs and gift entries made by UHS gift processors; make or submit corrections and recommend changes to UHS; proactively report on digital process functions (Homepage tool) for improvements. 	10%
<ul style="list-style-type: none"> Facilitate creation of UHCL cost centers and integration with UHS designations and ensure online giving options are aligned correctly; Give instructions for deactivation process as needed. Contribute feedback during UHS Gifts team meetings to identify new efficiencies 	10%
<ul style="list-style-type: none"> Prepare and process daily deposits through the university Business Services office. 	10%
<ul style="list-style-type: none"> Prepares and processes accounting documents including requisitions, purchase orders and vouchers to support key team members in University Advancement. 	5%
<ul style="list-style-type: none"> Other related duties as assigned. 	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