THE UNIVERSITY OF BRITISH COLUMBIA

#100 - 6253 N.W. MARINE DRIVE

VANCOUVER, B.C.   V6T 2A7

PERSONNEL SERVICES

December 31, 1986

Ms. Kitty Byrne
President
C.U.E.
Campus Mail

Dear Ms. Byrne:

Please find enclosed position descriptions being transferred to C.U.E. in the new Development Office effective January 1, 1987. Also please find position descriptions for positions in the Oral Biology Department and Oral Medical and Surgical Sciences Department in the Faculty of Dentistry. Descriptions for positions in the Clinical Dental Sciences Department of the Faculty of Dentistry are continuing to be written. We will forward copies as soon as we receive them.

Sincerely,

for Libby Nason, Manager
Employee Relations

LN/mjl

J O B   D E S C R I P T I O N

TITLE: SUPERVISOR, DONATIONS PROCESSING (Clerk 3)
DEPARTMENT: ALUMNI AND DEVELOPMENT INFORMATION SYSTEMS
REPORTING RELATIONSHIPS
        REPORTS TO: ASSISTANT MANAGER, ALUMNI AND DEVELOPMENT
                                        INFORMATION SYSTEMS
        SUPERVISES: DONATIONS PROCESSING CLERKS
                    CASUAL HELP FOR DONATIONS PROCESSING

PURPOSE OF POSITION

A supervisory position, the purpose of this job is the coordination and processing of all donations received by the Alumni Association and the Development Office, consistent with all audit requirements.

As is expected of all other positions in the Alumni and Development Information Systems department, the incumbent shall be expected to actively participate in Alumni Association activities such as Phonathons, and shall be expected to attend the Association Annual General Meeting.

All responsibilities and duties assigned to this position, now and in the future, shall be carried out in a timely and efficient manner.

KEY RESPONSIBILITY AREA #1: DONATIONS MAIL

- Receive and open all donations mail
- Visual scan of all donations for correct information
        i.e. Post-dated cheques; signatures; etc.
- Check donations cards for address changes; liaise with the Supervisor, Records Processing for processing of all address changes
- Separate donations into Alumni or Development
- Process each donation by assigning account numbers, fund numbers, and/or campaign numbers, as appropriate
- Tally all donations
- Prepare bank deposit
- Enter donations into the computer
- Balance entered donations with the bank deposit; make any necessary corrections
- Send bank deposit to Financial Services

KEY RESPONSIBILITY AREA #2: DONOR ACKNOWLEDGMENT
- Receive tax receipts from the Computing Centre for all
  donations processed since the last receipt run
- Arrange for electronic transfer of Names & Addresses (and
  all other information needed to prepare donor acknowledg-
  ments) of all donors for whom receipts have been received,
  to a PC (microcomputer) in the Information Systems depart-
  ment
- Using the microcomputer, prepare all necessary "THANK YOU"
  letters in accordance with the established DONOR ACKNOW-
  LEDGMENT PROCEDURE

KEY RESPONSIBILITY AREA #3: DONOR COMMUNICATION
- Respond to inquiries from donors concerning their donation
- In the absence of the Assistant Manager, liaise with the
  various university departments regarding particular
  donations and accounts

KEY RESPONSIBILITY AREA #4: MISCELLANEOUS
- Bring to the attention of the Assistant Manager problems
  encountered with processing for any particular campaign,
  new donation type, the structure and updating of the data-
  base, or any other problems or anomalous conditions
- Occasional duties as a relief switchboard operator

EXTERNAL RELATIONSHIPS
  Required to interact with donors, and with members of the
  university community

INTERNAL RELATIONSHIPS
  Required to interact with all Staff in the Information
  Systems department, as well as with all other Management and
  Staff in the Alumni Association

QUALIFICATIONS
- Highschool graduation with emphasis on accounting
  and office skills, or equivalent practical experience
- Six (6) months experience in the use of computer terminals
  for data entry
- Mature attitude towards job completion
- Strong inter-personal skills

EFFECTIVE DATE: January 1, 1987

JOB DESCRIPTION

TITLE: DONATIONS PROCESSING CLERK (Clerk 2)
DEPARTMENT: ALUMNI AND DEVELOPMENT INFORMATION SYSTEMS
REPORTS TO: ASSISTANT MANAGER, ALUMNI AND DEVELOPMENT
                                INFORMATION SYSTEMS

PURPOSE OF POSITION

A clerical position, the purpose of this job is to accurately maintain the financial information on the donor database.

As is expected of all positions in the Alumni and Development Information Systems department, the incumbent shall be expected to actively participate in Alumni Association activities such as Phonathons, and shall be expected to attend the Association Annual General Meeting.

KEY RESPONSIBILITY AREA #1: DONATIONS MAIL

Assist in opening and sorting all donations mail; prepare an adding machine tape of all donations received; ensure all donations have a pledge card; separate donations into batches by Fund number, and code onto tape; separate donations accordingly and prepare a tape for each batch; make up bank deposit(s), attach donations and tape; mail to Financial Services.

KEY RESPONSIBILITY AREA #2: DATA ENTRY

Process all donations received, ensuring correct donor numbers is on pledge card; enter donations into computer; balance computer total with tape and batch slip, making corrections as necessary.

KEY RESPONSIBILITY AREA #3: DEVELOPMENT OFFICE RECEIPTS

Separate receipts received from the Development Office and mail white copy with a "Thank-you" card; make an adding machine tape of all receipts received; ensure that receipts have appropriate donor number; batch receipts; enter into computer; balance computer total to tape and batch slip, making corrections as necessary; ensure "Thank-you" letters are generated for appropriate receipts.

KEY RESPONSIBILITY AREA #4: MAINTENANCE OF DATABASE
    Assist in maintaining accuracy of database by updating donor records as necessary.

KEY RESPONSIBILITY AREA #5: MISCELLANEOUS
    Assist in tracing lost or unknown alumni using computer, telephone, and any other materials available in the Records Office.

    The Incumbent may, also, be required to work as a relief telephone switchboard operator from time to time.

EXTERNAL RELATIONSHIPS: None

INTERNAL RELATIONSHIPS: Relates to other staff within department.

QUALIFICATIONS
    Highschool graduation, or better, with some emphasis on business practices; typing skills, preferably using a computer terminal; mature work attitude.

EFFECTIVE DATE: January 1, 1987

JOB DECSCIPTION

TITLE: RECORDS PROCESSING CLERK (Clerk 2)
DEPARTMENT: ALUMNI AND DEVELOPMENT INFORMATION SYSTEMS
REPORTS TO: ASSISTANT MANAGER, ALUMNI AND DEVELOPMENT
                                 INFORMATIONS SYSTEMS

PURPOSE OF POSITION
     A clerical position, the purpose of this job is to ac-
curately maintain the donor and alumni demographic information of
the database.

     As is expected of all positions in the Alumni and Develop-
ment Information Systems department, the incumbent shall be ex-
pected to actively participate in the Alumni Association ac-
tivities such as Phonathons, and shall be expected to attend the
Association Annual General Meeting.

KEY REPSONSIBILITY AREA #1 MAINTENENCE OF THE DATABASE
     Update donor and alumni records on the computer with any
changes received; process and maintain new graduates added to the
file; process changes and additions regarding special lists; en-
sure errors noted on Donor System audit report are corrected;
process name changes as required, by comparison with Registrar's
file.

KEY RESPONSIBILITY AREA #2: TRACING
     Maintain tracing information on alumni and donors in
database; trace lost or unknown alumni using computer, telephone
and other material available.

KEY RESPONSIBILITY AREA #3: MISCELLANEOUS
    Ensure filing is completed on a timely basis; process sack
of returned mail; assist with the entering of donations during
peak periods.

    In the absence of the Supervisor, Records Processing, bring
problems regarding the structure and updating of the database to
the Manager, Alumni and Development Information Systems.

    The incumbent may also be required to work as a relief
telephone switchboard operator from time to time.

EXTERNAL RELATIONSHIPS: Required to interact with Alumni.

INTERNAL RELATIONSHIPS: Relates to other staff within department.

QUALIFICATIONS:
    High school graduation, or better, with some emphasis on
business practices; typing skills, preferably using a computer
terminal; mature work attitude.

EFFECTIVE DATE: January 1, 1987

JOB DESCRIPTION

TITLE:___ SUPERVISOR - RECORDS PROCESSING (Clerk 3)
DEPARTMENT: ALUMNI AND DEVELOPMENT INFORMATIONS SYSTEMS
REPORTS TO: ASSISTANT MANAGER, ALUMNI AND DEVELOPMENT
                              INFORMATIONS SYSTEMS
SUPERVISES: RECORDS PROCESSING CLERKS
            CASUAL HELP FOR TRACING/RECORDS PROCESSING

PURPOSE OF POSITION
    A supervisory position, the purpose of this job is the coor-
dination and processing of all pertinent demographic information
necessary to accurately maintain the database.

    As is expected of all positions in the Alumni and Develop-
ment Information Systems department, the incumbent shall be ex-
pected to actively participate in Alumni Association activities
such as Phonathons, and shall be expected to attend the Associa-
tion Annual General Meeting.

KEY RESPONSIBILITY AREA #1: SUPERVISION - MATERIAL AND LISTS
    Maintain the inventory of reference material required for
tracing lost or unknown alumni; ensure Special Lists, which in-
clude Alumni and non-alumni are maintained.

KEY RESPONSIBILITY AREA #2: SUPERVISION AND TRAINING
    Train and supervise non-record department staff in the use
of the computer terminal, use of reference material for the pur-
pose of updating and searching the computer file.

KEY RESPONSIBILITY AREA #3: LIAISON
    Maintain communications with other universities, UBC campus
departments, societies etc. for information or material in the
aid of tracing.

KEY RESPONSIBILITY AREA #4: MISCELLANEOUS
     Report any problems regarding structure and updating of the
database to the Manager, Alumni and Development Information
Systems; process any changes required by the errors noted on
Donor system audit report; process returned mail; assist with
entering of donations during peak periods; assist with the
Senate/Chancellor election, if so requested.

EXTERNAL RELATIONSHIPS; Required to interact with alumni and with
members of the university community, as well as management of ex-
ternal agencies, professional societies, foundations, etc.
INTERNAL RELATIONSHIPS: Required to interact wth all staff in the
Information Systems department, as well as with all other Manage-
ment and Staff in the Alumni Association.

QUALIFICATIONS:
     Highschool graduation, or better; six (6) months experience
in the use of computer terminals; mature attitude toward job
completion; strong interpersonal skills.

EFFECTIVE DATE: January 1, 1987