

YUKON UNIVERSITY
POSITION DESCRIPTION

PART I - IDENTIFYING DATA

Position Number: YC1237-0
Position Title: Stewardship Officer
Incumbent: Vacant

Headquarters: Whitehorse
Supervisor's Name:
Supervisor's Title: AVP, University Relations

Division: University Relations

Date JD Completed: November 2021

PART II - SUMMARY (broad statement of why position exists)

Reporting to the Associate Vice President, University Relations, this unique and dynamic position provides financial and administrative service to the YukonU Foundation Board and Development Office. This position works in partnership with donors, faculty, staff, and other stakeholders to ensure that all donations received by the Yukon University Foundation are accounted for, and in accordance with, the policies of the University and the Canada Revenue Agency.

This detail-oriented position requires high accuracy and efficiency to coordinate financial transactions. It also requires excellent communication skills to work collaboratively with foundation board members, prospective donors, and staff and faculty. This position handles sensitive and confidential files such as donor financial information, securities transfers, and anonymous gifts.

A. Duties and Responsibilities

- Efficiently manage monthly financial transactions and yearly processes
- Independently assess priorities, considering the impact on other units across campus, providing support and expertise as needed.
- Utilize automated online donation platforms, incorporating enhancements and highlighting potential implementations.
- Initiate, design, and implement processes to improve customer service and operational efficiency.
- Provide expertise and knowledge to internal and external stakeholders regarding processing donations to Yukon University and the Yukon University Foundation, ensuring compliance with relevant regulations and donor directives.
 - Issue charitable donation receipts related to all fundraising activities and donations.
- Handle highly sensitive and confidential issues such as donor financial information, securities transfers, and anonymous gifts.
- Provide administrative support to the Foundation Board and Development staff including setting agendas, minute taking, and other tasks as required.
- Oversee processing of campaign, major gift, direct mail, and online donations, ensuring balanced and ready batches for bank deposits.
- Reconcile cash, cheques, and credit cards with donations entered or downloaded into the donor database.
Prepare paperwork and complete deposit slips.
- Work collaboratively with YukonU's Finance Clerk to reconcile and manage financial records related to fundraising activities.
- Work collaboratively with Development's Budget Officer to ensure quarterly reimbursement of Foundation expenses charged to Yukon University.
- Review complex gift entries and monthly reconciliations of various project funds.

- Work collaboratively with the Financial Aid Officer and Finance Clerk to prepare, upload and send the annual T4A list for awards administered by the YukonU Foundation.
- Facilitate communications to the Foundation Board, relaying information about, and invitations to (where appropriate), activities, presentations, media releases, and special events.
- Create, maintain and administer an annual stewardship calendar, ensuring entry of new contributions, timely reporting, expiration of terms/opportunities to renew, and regular communication with donors.
- Work collaboratively with YukonU's Accounts Receivable Clerk to ensure timely invoices on multi-year gifts received directly by YukonU.
- Ensure activation, administration and tracking of the Donor Recognition Matrix.
 - Field enquiries regarding potential donations from across YukonU and the general public.
- Work collaboratively with the Marketing and Communications Office to create, maintain and enhance the Giving section of the YukonU website.
- Work collaboratively with Procurement to set up and monitor external contracts and purchases.
- Work collaboratively with external contractors to plan, monitor and finalize special projects as they arise.
- Work collaboratively with other units across campus during special events to ensure donor inclusion and recognition where appropriate.
- Liaising with stakeholders to complete reports, transactions and revisions effectively.
- Supporting the development of accurate financial statements, ledgers and forms.
- Assisting with audit preparation, auditor reviews and implementation of recommendations.
- Working with budget officers and other members of the Finance Team to ensure that they are providing cohesive, consistent, high-quality service to internal and stakeholders.
 - Making recommendations to improve financial controls, policies, and workflow processes

Approximate percentage of job time above functions are performed: 90%

2. Other Principal Activities, in order of importance (describing for each what, why, and how, and approximate percentage of job time required, rounded off to the nearest 5%):

- Annually update the Student Award display in collaboration with the Financial Aid Advisor, and the Donor Recognition display.
- Collaborate with the Student Aid Advisory to coordinate annual donor recognition events.
- Issue annual student award invoices and monitor payments.
- Work collaboratively with the Manager, Financial Services to prepare for the Foundation's annual audit.

Approximate percentage of job time above functions are performed: 10%

3. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position:

One Year

B. Problem-solving and decision-making

1. a) List any sections of Acts, Regulations, and Policies or Procedures the incumbent must be fully familiar with in order to perform the position's functions:

- Yukon University Policies and Procedures as they relate to Accounts Payable, Accounts Receivable
- Yukon University Philanthropic Gift Acceptance Policy
- Yukon University Gifts-in-Kind Policy
- Yukon University Fundraising Policy

b) Is the position responsible for interpreting, administering, or enforcing any of the above? If yes, explain.

- Incumbent is expected to interpret and administer above to ensure compliance; and
- If required, matters are forwarded to the supervisor for resolution.

2. a) Describe the kinds of recommendations the incumbent is regularly required to make and to whom:

- To Clients: Incumbent is expected to interpret and administer related Yukon University Policies and Procedures in order to assist Yukon University staff, faculty and Foundation Board in making procedural decisions; and
- To Supervisor: Incumbent will make recommendations regarding changes in processes, record keeping, and the handling of unusual transactions.

b) Who normally makes the final decisions with respect to those recommendations?

Manager – policy decisions approved at Senior Management level

- Clients or Supervisor respectively

3. a) Describe the kinds of final decisions regularly made for which the incumbent is held accountable.

- Incumbent establishes priority of duties on a daily and weekly basis in order to meet established deadlines;
- When to inform Supervisor of non-compliance or unusual transactions; and

b) What is the direct impact of those decisions?

- Errors in judgment re determining daily work priorities could impact the functioning of the Development Office and overall service delivery; and
- Incorrect interpretations of University policies and/or procedures could result in inappropriate or incorrect transactions being processed.

C. Freedom to Act

1. Describe the way in which this position receives direction:

- Requisitions from Client Departments
- Client Department requests
- Daily discussions with Manager on priorities and status of transactions
- Regular staff meeting in the Unit

2. What legislation, regulations, procedures, or established practices guide, constrain, or limit the activities of this position?

See B. 1. a

3. How is the work of the position normally checked or evaluated?

- Internal client feedback
- Supervisor feedback

4. **What types of decisions are normally referred to the supervisor? (Give examples)**
- How to handle recurring issues of non-compliance of divisions to policy/procedures
 - How to handle unusual matters not covered by policy
 - Recommendations for procedural improvements

D. Financial Accountability

1. **a) Annual Budget (for unit under the direct control of the position):**

Fiscal year:	\$ N/A
Annual payroll:	\$
O/M Budget (excluding payroll):	\$
Capital Budget (excluding payroll):	\$
Revenues:	\$
Recoveries:	\$

- b) **Who prepares this budget?** N/A
 c) **What is this position's accountability for budget once allotted?** N/A
 d) **Does position have authority/ability to reallocate resources? (describe)**No
 e) **Signing authority levels:**

The incumbent is delegated payment authority to process payments that are in accordance with University policies and procedures.

2. **Other expenditures or revenues influenced by this position and how.**

Position influences how expenditures are made by ensuring conformance to Policy/procedures and compliance with applicable laws and regulations.

E. Management Supervision of Human Resources

<input checked="" type="checkbox"/>	1. No supervisory duties
<input type="checkbox"/>	2. Supervisory Duties

- a) Number of positions supervised directly:
 0 Permanent
 0 Aux/Casual

- b) Nature of supervision: **(check any of the following supervisory tasks that are to be performed on a regular basis):**

<input checked="" type="checkbox"/>	a)	Show colleagues how to do tasks.
<input checked="" type="checkbox"/>	b)	Train other employees in work procedures.
<input type="checkbox"/>	c)	Assign work and review for quality/quantity.
<input type="checkbox"/>	d)	Establish work priorities and schedules.
<input type="checkbox"/>	e)	Change duties and responsibilities.
<input type="checkbox"/>	f)	Participate with supervisor in employees' performance evaluation; -or- Formally appraise employees' performance and discuss appraisal with them, making a final recommendation to advance or withhold merit increments.
<input type="checkbox"/>	g)	Recommend appointment or rejection upon completion of probationary period.

	h)	Interview employees with attendance or performance problems.
	i)	Act as first formal step in the grievance procedure.
	j)	Interview candidates for vacant positions in the unit.
	k)	Give opinion to supervisor on selection of new employees; - or - Make final decision on selection of employees.
	l)	Other.

F. Key Personal Contacts

<u>Who (what positions or groups)</u>	<u>Purpose</u>	<u>Frequency</u>
University Staff	Address queries relating to the processing of transactions	Daily
Suppliers	Information on payments or credits	Occasionally
Funders	Address queries relating to the processing of transactions	Occasionally
Students	Addressing queries about Student Training Allowance payments	Occasionally

G. Tools, Equipment, or Machinery Used

<u>Name</u>	<u>Purpose</u>	<u>Percentage of time</u>
Computer/printer/scanner		75%
Fax machine	Vendor/contractor contacts	5%

H. Working Conditions

Describe any adverse conditions that are normal and expected in the job.

a) Describe weights lifted:

<u>Type</u>	<u>How Heavy</u>	<u>Percentage of time</u>
File boxes	25 lbs	5%

b) What working conditions (sitting, standing, bending, reaching) or types of physical effort (hiking, walking, driving) are required?

<u>Type</u>	<u>Percentage of time</u>
At workstation or meeting table (sitting and standing)	90%
Walking/standing (retrieving faxes/printing, or filing)	10%

c) Describe any physical hazards present:

<u>Type</u>	<u>Percentage of time</u>
Work on computer	75%

d) Describe special physical conditions leading to discomfort:

<u>Type</u>	<u>Percentage of time</u>
-------------	---------------------------

	%
--	---

e) **Interpersonal Conditions:** Check any of the following conditions, which are normal and expected in the job and give examples:

	high level of dissatisfied clients
	high level of emotional clients
	potential for physical abuse from clients
x	regular critical deadlines
	high level of irregular critical deadlines
x	constant interruptions
x	instructions from more than one source
	students or staff under work related stress
	Other: mental stress due to nature of problem solving and multi-tasking

Examples in support of

Regular critical deadlines will be a factor when performing payroll back-up functions and when auditing and running the weekly accounts payable cheques;

Instructions from one source will occur when processing conflicting demands from peers that need support from this position

(f) Travel Required

a)	average number of trips annually	
b)	average number of days per trip	
c)	average distance per trip	
d)	most frequent mode of transportation	

I. Organization Chart

- Complete portion **above** dashed line whether the position supervises or not.
- Complete portion **below** dashed line if this position supervises others.

IMMEDIATE SUPERVISOR'S POSITION

Title: Associate Vice President, University Relations
 Classification Level: **MG 03**

PEER POSITIONS: (all those reporting to the same immediate supervisor)

Title : Development Officer
 Classification Level:

SUBJECT POSITION TITLE: Stewardship Officer

SUBORDINATE POSITIONS: N/A

Title	Title:
Classification Level:	Classification Level:
No. of Employees	No. of Employees:

N/A

PART III – SIGNATURES

I confirm that this describes the duties and responsibilities I require of an incumbent in this position and have reviewed the description with the incumbent (where applicable).

.....
Dean/Director or Designate

Date:

I have read the foregoing position description and understand that it is a general description of the duties and responsibilities assigned to the position I occupy.

.....
Incumbent

Date:

PART IV - QUALIFICATIONS

To be completed by the Dean/Director or designate

A. Minimum Knowledge, Skills, and Abilities Required

- Knowledge of, and experience with, the reconciliation of GL and Bank accounts;
- Knowledge of, and experience with, spreadsheets (Excel) and word processing (Word) software;
- Knowledge of, and experience with, office practices and procedures;
- Ability to work collaboratively with internal and external partners
- Ability to function as part of a team;
- Ability to communicate effectively in a variety of situations;
- Ability to problem solve;
- Ability to apply strong organizational skills;
- Ability to provide excellent customer service.

B. Licenses, Certificates Required - Give title and section of any legislation, regulations, or other authority where applicable.

- 2-year or higher diploma or degree in a related field is an asset

C. Other skills and/or knowledge which may be desirable, but not necessarily essential to the performance of the position's duties.

Completion of an accounting diploma or a minimum of 2 years of accounting coursework towards an accounting designation

Experience working on a large integrated computerized information system

PART V – UNIVERSITY SIGNOFF

Comments:

I approve this position description as being representative of the work I require to be performed and that the responsibility levels identified have been delegated to this position.

.....
Director, Human Resources Services

.....
University President

Date:

Date:

FOR HUMAN RESOURCE SERVICES USE ONLY:

Evaluation Point Results:	
Knowledge and Skills:	...
Accountability:	...
Mental Demands:	...
Working Conditions:
Total Points:	...
Pay Level:	...6