Human Resource Services

Annual Salary Range: $50,578 - $74,380 Status: Exempt Position No:

Advancement Fiscal Affairs Specialist & Internal Auditor

PURPOSE OF THE JOB

This description may not include all of the duties, knowledge, skills or abilities associated with this position.

The Advancement Fiscal Affairs Specialist/ University Internal Auditor will report to the Vice President for Advancement/President. The Advancement Fiscal Affairs Specialist will provide financial management, monitoring and expertise to all revenues, expenses, endowment funds, investments and donations in the area of Advancement. The position works closely with Coordinators for Advancement Services, the Administrative Assistant to the Foundation and the Foundation Board.

The Internal Auditor responsibilities include maintaining the independent appraisal function of the University by planning and performing audits of University departments, functions and programs.

ESSENTIAL FUNCTIONS AND RESPONSIBILITIES

(What duties are required for the position to exist? Estimate the percentage of time spent in each.)

5% Oversees financial policies and procedures for the accurate and consistent recording and reporting of all financial matters including budgeting, external financial reporting, internal financial reporting, restricted grant analysis, capital funds tracking, project cost accounting, project and operational performance analysis, periodic reports to the Board of Directors, internal cost studies, and grant applications.

5% Develops and maintains an electronic repository of all monthly reports issued from Advancement Services on the server so that this information is archived and available for analysis at future points in time.

5% Acts as the central person within Advancement Services responsible for providing tax advice and interpretation of IRS tax issues in relations to donations.

5% Monitors NSF checks, monitors and reconciles credit card processing submissions to ensure that processing was complete and accurate.

5% In conjunction with the VPUA, prepares the annual budget for Advancement Services and monitors expenditures.

5% Ensures that, as appropriate, hard copies of all financial reports and special projects are filed in a consistent and organized fashion.

5% Works with the Advancement staff to identify financial and program evaluation reporting requirements and to communicate to them relevant procedures relating to the financial management of donations.

5% Develops and manages an ongoing audit program which reviews how donations are received and forwarded to the foundation and other aspects related to the flow of checks, paperwork, and systems-supporting the eventual entry of donations into Raiser's Edge.

5% Manages the preparation of all financial reports from University Advancement including the preparation of fiscal year-end audit.

5% Ensures through various annual, quarterly, and monthly reconciliations that reports are accurate and prepared and submitted in a timely manner.

5% Analyzes, improves and adds new reports and schedules on an on-going basis to facilitate the tracking of the performance of the various fundraising programs.

5% Develops and maintains fundraising performance on a quarter by quarter basis.

5% Makes financial presentations at board meetings and at the periodic meetings.

5% Participates in long-range and annual development (fundraising) planning.

5% Conducts statistical analysis of current programs and provides regular reports on annual giving.

5% Remains up-to-date on current fund raising, direct marketing and volunteer management programs, practices and procedures being used in the not-for-profit sector as well as current tax laws affecting annual charitable giving.

5% Oversees the Advancement external audit, reviews and analyzes results and recommends for approval the audited financial statements.

5% Prepares the financial section of the Advancement annual report.

5% Oversees the Cash Management function, including banking relationships.

5% Ensures the Foundation is in compliance with all internal policies and relevant regulations and ensures filings are completed in a timely manner.

5% Manages ongoing Advancement banking relationships for maximum efficiency.

5% The University Internal Auditor will review and evaluate internal controls for compliance with Board of Curators objectives, policies, and procedures, and governmental laws and regulations.

5% The University Internal Auditor will provide ongoing monitoring of the all university financial functions, and provide periodic written reports to the president.

5% The University Internal Auditor will conduct reviews of University departments, functions and programs as requested by the president, and provide written reports of findings to the president.

OTHER DUTIES AND RESPONSIBILITIES

(Responsibilities/important duties performed occasionally or in addition to the essential duties of the position.)

Serve on University committees
Track and analyze Foundation Board Scholarship awards

SUPERVISORY RESPONSIBILITIES

(Provide the number and type of employees supervised, level of authority to hire and make recommendations to fire.)

Supervise student work-study students

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

(Indicate which are required, preferred, or desirable. Include licenses and certifications.)

Experience working in not for profit, knowledge of Blackbaud Raisers Edge.
Experience in working in Datatel.
Good organizational skills with the ability to handle multiple tasks.
Good communication skills and the ability to cooperate well with others, establish and maintain relationships; adaptable and persevering.
Effective listener, self-reliant, decisive, enthusiastic and makes positive impressions on others.
Anticipates customers' concerns and is customer service oriented.

EXPERIENCE AND EDUCATION

(Indicate which are required, preferred, or desired.)

Bachelor's degree in business preferred or business training or equivalent; with at least two years experience in accounting and auditing.

FISCAL RESPONSIBILITY

(Budgeting responsibilities, approval privileges on purchase orders and check requests, reporting and auditing functions).

Functions as the Internal Auditor for the University.

EXTENT OF PUBLIC CONTACT

(Within and outside the University)

The position interacts with Alumni, Faculty, staff, and students; companies, businesses and retirees, Board of Curators, Foundation Board members and prospective donors.

PHYSICAL DEMANDS

(Walking, lifting, equipment, operation, etc.)

1. Ability to sit at a workstation for extended periods
2. Occasional ability to lift, carry, and put away parcels weighing up to 25 pounds
3. Normal physical mobility, which includes movement from place to place on the job taking distance and speed into account
4. Normal physical agility, which includes ability to maneuver body while in place
5. Normal physical strength to handle routine office materials and tools
6. Normal dexterity of hands and fingers
7. Normal coordination, including eye-hand, hand-foot
8. Normal endurance

WORKING CONDITIONS AND ENVIRONMENT

(Necessary traveling, unusual work hours, unusual environmental conditions, etc.)

Normal 40 hours work week (8 am – 5 pm during regular class sessions; 7:30 am – 6 pm during summer work hours).

The work environment involves everyday risks or discomforts which requires normal safety precautions typical of such places as offices, meeting and training rooms.

Overtime work may be required on occasions, dependent on workload and work objectives.

Travel on occasion may be required as it relates to position's responsibilities;

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The functions, qualifications, knowledge/skills, and physical requirements listed in this job description represent the essential duties of the job, which the incumbent must be able to perform either with or without reasonable accommodation. The Job Functions listed do not necessarily include all activities that the individual may perform and, should not be considered an all-inclusive listing of the job requirements.