

**St. Lawrence College
Position Description Form (PDF)**

Effective Date: March 1, 2007

Updated: June 10, 2026

Campus: Kingston

Incumbent's Name: Vacant

Position Title: Advancement Operations Officer

Payband: G

Position Number: 00000263

NOC Code: 13100

Hours per Week: 35

Supervisor's Name and Title: Elizabeth Gorman, Director, Development & Alumni Relations

Completed by: Elizabeth Gorman, Director, Development & Alumni Relations

Signatures:

Incumbent: _____
(Indicates the incumbent has read and understood the PDF)

Date: _____

Supervisor: _____

Date: _____

One-Over-One: _____

Date: _____

Support Staff PDF

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled “A Guide on How to Write Support Staff Position Description Forms” or contact your Human Resources representative for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements**.

Position Summary

Provide a concise description of the overall purpose of the position.

Reporting to the Director, Development and Alumni Relations, the incumbent supports the department in achieving fundraising and alumni engagement goals for the College, with a strong focus on excellent customer service and teamwork. The incumbent provides data coordination and administrative support for the office including charitable gift processing and stewardship, database maintenance and querying, prospect research and prospect pipeline data coordination, donor-funded student awards support, alumni and donor communications, and frontline customer service. A successful incumbent will demonstrate strong attention to detail, have a proven track record of outstanding planning and organizational skills, exhibit excellent customer service, and demonstrate a commitment to the SLC Values.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of the Time Annually*
<p>1. Gift Administration and Stewardship Under guidance from Associate Director, Development, coordinates gifting, receipting and recognition:</p> <ul style="list-style-type: none"> • Responsible for timely and accurate gift processing, receipting and recording, including acknowledgements and information updates in the alumni and donor database, in accordance with the College’s Gift Acceptance Policy, privacy legislation, and CRA reporting standards and guidelines; • Coordinates commemorative giving processes, including acknowledgements, donor notifications, and coordination with internal partners for commemorative landscape opportunities; • Coordinates, tracks fulfilment of pledges; • Sets up, maintains and reports on online giving pages, including monitoring and making recommendations for updates to webpages related to giving; • Supports recognition and stewardship activities for donors and volunteers; • Communicates with donors, alumni, prospects and volunteers, logging key information in the alumni and donor database. 	35%
<p>2. Data Coordination Under guidance from Associate Director, Development, maintains data in the alumni and donor database:</p> <ul style="list-style-type: none"> • Maintaining data in alumni and donor database including biographical information, gifting and receipting preferences, communication preferences, alumni engagement, prospect tracking, donor fund records, and fundraising appeals; • Pulls lists from the database for various operations, and with varied parameters, including donor and alumni communications, affinity partner programs, annual giving appeals, and prospect pipeline management; • Uploads data to alumni and donor database, including daily gift batches, recurring pledge payments, monthly fund activity; • Coordinates monthly financial reconciliation processes with Finance team including document and data submission; 	40%

Support Staff PDF

<ul style="list-style-type: none"> • Maintains list of fund disbursements and communicates quarterly fund balances to internal partners; • Award administration support, including pledge reminders, follow-ups with donors, student award recipients and internal team members; entering and maintaining award disbursement directions and fund contacts in the donor and financial databases; • Donor prospect research, including monitoring grant application cycles and funding alignment with philanthropic priorities; escalating individuals and businesses for further research and qualification • Annual appeals support, including mailhouse coordination, materials preparation, list-building and results tracking • Processes and records disbursements of donor funds to internal teams, projects; • Receives, deposits and records external awards and communicates with Financial Aid for posting to student accounts. 	
<p>3. Program Support and Office Administration Provides administrative support to the department:</p> <ul style="list-style-type: none"> • Provides exceptional front-line customer service through phone calls, email and in-person, including assessing and forwarding queries received to other team members, as appropriate • Supports alumni engagement programs including alumni volunteer tracking and recognition; event planning and delivery; alumni communications development and delivery including marketing emails, alumni magazine, and other channels; convocation planning and delivery; and online platforms • Maintains a good understanding of the Alumni and Development office services and responds to a range of inquiries on behalf of the team on subjects like alumni services and benefits, charitable support, alumni and donor database information, and Alumni and Development policies, procedures and practices. • Coordinates the day-to-day departmental office operations, including ordering of supplies, and procurement/purchasing, as directed • Processes financial transactions and collaborates with the Finance office as needed to support department • Coordinates and oversees student staff including hiring and contracts, training, scheduling, and managing tasks and workflow • Maintains departmental files (hard copy and electronic records) 	20%
<p>4. Performs other related duties as required.</p>	5%
	100%

* To help you estimate approximate percentages:

½ hour a day is 7%

1 hour a day is 14%

1 hour a week is 3%

½ day a week is 10

½ day a month is 2%

1 day a month is 4%

1 week a year is 2%

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the job training in this information.

- Up to High School or equivalent
- 1 year certificate or equivalent
- 2-year diploma or equivalent
- Trade certification or equivalent
- 3-year diploma/degree or equivalent
- 3-year diploma / degree plus professional certification or equivalent
- 4-year degree or equivalent
- 4-year degree plus professional certification or equivalent
- Post graduate degree or (e.g. Masters) or equivalent
- Doctoral degree or equivalent

Field(s) of Study:

Minimum 2-year diploma in business admin, data analytics or equivalent, in a field relevant to the duties of the position.

B. Check the box that best describes the requirement for the specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirements that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No Additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirement obtained by course(s) of a total between 101 and 520 hours
- Additional courses obtained by course(s) of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of years of experience, in addition to the necessary education level required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or the on-the-job training occurs after the conclusion of the educational course or program.

<input type="checkbox"/> Less than one(1) year	
<input type="checkbox"/> Minimum of one (1) year	
<input type="checkbox"/> Minimum of two (2) years	
<input checked="" type="checkbox"/> Minimum of three (3) years	A minimum of 3 years of experience in an data coordination role. Experience with fundraising database software, and knowledge of gift processing and Canada Revenue Agency legislation, or similar experience will be a definite asset.
<input type="checkbox"/> Minimum of five (5) years	
<input type="checkbox"/> Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgment required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
Key issue or problem encountered.	Receive a donation and request for charitable tax receipt without information about where gift is to be directed
How is it identified?	Donation to St. Lawrence College (cash, cheque, credit card, gift of stock) received without documentation or direction.
Is further investigation required to define the situation and/or problem? If so, describe.	Review database records and contact departmental colleagues to determine whether the gift was solicited/expected and confirm gift designation. Failing that, reach out to donor to confirm gift and preferred direction.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Review prior donor history in Raiser's Edge database to determine giving history, if there has been any recorded contact with members of the team, and/or if a recent fundraising appeal has been sent.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	Colleagues, Donor, Database records,

3. Analysis and Problem Solving

Key issue or problem encountered.

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)

#2 regular & recurring

Monthly donation revenue reports don't match – Raiser's Edge donor records and online gift processing merchant account records

Monthly reports are pulled, totals are compared and discrepancy(ies) identified

No

Determine where the source of the error or omission lies (Raiser's Edge gift entry or merchant account processing), by reviewing and comparing transactions. If error or omission is identified in Raiser's Edge, correct record. If error identified in merchant services, escalate for review.

Past practices, established business rules or procedures, Associate Director, Development, third-party database support (RESTech)

3. Analysis and Problem Solving

Key issue or problem encountered.

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)

#3 regular & recurring

Donor contacts the office stating that their charitable receipt has incorrect information on it, such as the address, and they require a new receipt.

Outreach from the donor.

No

Confirm the correct information with the donor and how they would like to receive the new receipt. Follow CRA guidelines and established business rules or procedures to void and re-issue the receipt and record in Raiser's Edge for financial auditor trail. Advise Associate Director, Development for auditing purposes.

CRA guidelines for re-issuing receipts, established business rules or procedures, Associate Director, Development, third-party database support (RESTech)

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally:

	#1 regular and recurring
List the project and the role of the incumbent in this activity.	Annual awards renewal coordination – support and execute the creation of the donor list for the annual appeal for awards renewals, proof and prepare the materials to be sent, coordinate with the mailhouse, track outcomes, coordinate follow up actions
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Project coordination skills, data synthesis, communication skills, and ability to work proactively and produce information in a timely manner.
List the types of resources required to complete this task, project or activity.	Raiser’s Edge database, Microsoft Excel and Word, Adobe
How is/are deadline(s) determined?	Under direction from the Associate Director, Development, based on the annual appeals framework
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent monitors project status and outcomes and makes recommendations for changes as needed. Works with others on team to optimize results of awards renewal.

4. Planning/Coordinating

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.

#2 regular and recurring

Coordinate preparation for Convocation events, including ordering materials in advance, producing marketing materials, developing packing lists for each set of ceremonies, coordinating and overseeing event set up and tear down

Attention to detail, project coordination skills, communication skills, coordination with other departments, awareness of health and safety considerations, knowledge of College purchasing policies and procedures.

College policies and procedures, external vendors.

Deadlines are established according to the Convocation timelines and in coordination with the Alumni and Donor Relations Officer.

The incumbent works with the Alumni and Donor Relations Officer and Director to communicate changes to plans and make recommendations actions as required. Eg If a vendor delivery is delayed, communicate with colleagues and offer suggestions for alternate options.

4. Planning/Coordinating

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.

#1 occasional (if non, please strike out this sections)

Review and process donor pledge reminders and renewals at regular intervals

Organizational skills, communication skills, attention to deadlines, attention to detail.

Incumbent will review the pledges in the database, with attention to upcoming pledge end dates and process corresponding reminder letters or emails, using mail merge or other platforms as required.

Incumbent will work with Associate Director, Development (or donor relationship manager) as needed.

Raiser's Edge database, established queries and automated reports

Recurring gift cycles, pledge reports, and in collaboration with Associate Director, Development and relationship manager(s).

The incumbent can make recommendations to the Associate Director, Development, or Director, Development and Alumni Relations on changes to the timing of pledge reminders, the communication that accompanies them or the necessity of them depending on the donor/relationship and the efficiency of the project.

5. Guiding/ Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work skill development.

Though support staff cannot formally “supervise “others, there may be a requirement to guide others using the incumbent’s job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks. Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students	Explain in person, by phone and by email the services provided by Alumni & Development office. Respond to financial inquires regarding charitable gifts and alumni questions by email, in person, by phone and in writing. Internal customers (students, faculty, staff) and external customers (alumni, donors, community members)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks	Share knowledge with student employees Eg. the need for confidentiality, relevant database processes and procedures. Be one of the resources for the student employees when they have a question or need guidance.
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in this position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (If none, please strike out this section)
The incumbent is largely working on own with intermittent checks. The incumbent is primarily self-directed and adheres to established processes. Owing to the sensitive and confidential nature of what the incumbent does, they consult with the Director, Development and Alumni Relations and the Associate Director, Development on a daily basis. Each is very well aware of the other's activities and plans.	The incumbent would receive direction on fundraising appeals – regular and new. The incumbent would receive instructions for new or differing alumni engagement programs. The incumbent would receive special case rules for atypical data entry and notification of the creation/relocation of database fields.

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (If none, please strike out this section)
College policies, departmental procedures, software manuals, Raiser's Edge fundraising software procedures, office procedures, standard accounting and reporting procedures. Policies and procedures are available on a wide range of issues. Other college procedures directed by the Board of Governors, President's office, and Financial Services must be followed.	Updates to CRA legislation

How is work reviewed or verified (e.g. Feedback from others, work processes, supervisor)?	
Regular and Recurring	Occasional (If none, please strike out this section)
Incumbent is responsible for the accuracy of work. Incumbent is expected to make decisions to solve operational problems. The incumbent would refer to their supervisor in situations where strategy, conflict of interest or ethics might be involved and where there is not a specific policy or procedure in place to deal with the situation. The incumbent would also consult with their supervisor and make recommendations in priority setting situations where a number of parties i.e.: staffs, volunteers, donors, award winners, are making demands on their time at the same time. Supervisor would also be consulted for customer complaints of a serious nature.	Regular audits and reviews of gift and data accuracy is completed by the Associate Director, Development to ensure all data is accurate Feedback is provided by various members of the team based on project scope and delivery to ensure incumbent has all information needed to successfully complete tasks Regular one on one meetings with the Director, Development and Alumni Relations

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the supervisor.

Support Staff PDF

Regular and Recurring	
Incumbent consults with Associate Director, Development regarding gift coding or allocation. Incumbent consults with relationship manager(s) on donor outreach or communications. Incumbent consults with Alumni and Donor Relations Officer on alumni program planning and delivery and alumni frontline communications and support.	

Describe the type of decisions that would be decided in consultation with the supervisor.

Regular and Recurring	
Incumbent consults with supervisor about customer complaints or issues, requests from external sources for access to data (records or financial), prioritizing workload, student hiring and support, financial management and oversight, alumni and donor interaction and support, and coordination of work with other departments	

Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring	
Incumbent will determine where to direct emails, telephone, walk ins or other inquiries depending on the nature of question to be addressed. Incumbent monitors and determines when office supplies should be ordered.	

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which a position delivers service to customers. It is not intended to examine the incumbent’s interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfill the service requirement. A “customer” is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D,W,M,I)*
How is it received?	How is it carried out?		
Mail, email and in person.	Donation is received, deposited, entered in database, receipted, and acknowledged according to the stewardship matrix.	Donors	D
Email and phone.	Address update or changes to data. Database is updated.	Alumni	D
In person and by email	Provide information and updates about frontline customer support	Alumni and Development team	D
In person and by email	Reply to inquiries and provide information on donations, awards, funding opportunities and alumni volunteer engagement	Faculty/Staff	W
Email, phone and in person.	At direction of Director, consult with vendors to determine what to order. Request quotes for promotional materials.	Suppliers	M
Email, phone and in person	Requesting and sharing pertinent information. Scheduling appointments/meetings.	President/VP (or offices of)	W
Email and in person	Recognition and stewardship for alumni volunteer activities	Volunteers	I

* D = Daily W = Weekly M = monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section (s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy	Explain in person, by phone and by email the services provided by Alumni and Development office	Alumni, donors, friends of the college, colleagues, faculty/staff and general public.	D
Explaining and interpreting information or ideas.	Initiate and respond to inquiries regarding charitable gifts by email, in person, by phone and in writing	Donors, faculty/staff and community	D
Training	Provide training and guidance to bursary students while following policies and procedures	Bursary students	M
Obtaining cooperation or consent	Work with Awards team, get the necessary permission or approval so that the necessary award stewardship can be given to donors.	Colleagues	I
Negotiating	Work with vendors to obtain best pricing for supplies and giveaway materials for events	Vendors	I

* D = Daily W = Weekly M = monthly I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, and lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D,W,M,I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1-2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting	D		X		X		
Walking	D	X					
Standing	D	X					
Bending	D	X					

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If lifting is required, please indicate the weights below and provide examples.

- Light (up to 5 kg or 11 lbs.)
- Medium (between 5 to 20 kg and 11 to 44 lbs.)
- Heavy (over 20 kg. or 44 lbs.)

Carrying materials for donor or alumni events. Maintaining storage area with event materials (banner, signs, swag inventory)

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform the task and the duration of the task, including breaks (e.g. up to two hrs. at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Gift entry, deposits and receipting	D		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No - Can be interruptions with phone or walk in customers				

Activity #2	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Pulling and preparing data lists for communications (email or mail)	W		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No - Can be interruptions with phone or walk in customers				

Activity #3	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Monthly financial reconciliation processes	M			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No - Can be interruptions with phone or walk in customers				

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11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D,W,M,I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)	Office environment	D
<input type="checkbox"/> accessing crawl paces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environment		
<input checked="" type="checkbox"/> travel	Travel to other campuses for events or activities	I
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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