



UNIVERSITY OF LEEDS

## CANDIDATE BRIEF

Finance and Donations Coordinator, Alumni and Development



**Salary: Grade 5 (£22,659 – £26,243 p.a.)**

**Reference: CSADT1053**

**We will consider flexible working arrangements**

## Finance and Donations Coordinator Alumni and Development

**Do you want to join a high profile, successful alumni engagement and fundraising team within the University? Are you experienced in income and expenditure account management; and do you have a demonstrable understanding of financial principals, systems and procedures, with a strong ethical will to ensure charitable donations are managed in accordance with donor expectations? Are you an analytical thinker with a high degree of initiative and the ability to identify solutions?**

The University of Leeds has one of the largest alumni communities in the Russell Group and benefits hugely from the interest, involvement and support of an engaged alumni and donor community. Alumni and other supporters make a significant contribution to the University's strategic priorities in student education, research and internationalisation through their advocacy and generous gifts of time and money.

To date the University's 'Making a World of Difference' Campaign has raised over £95m, against a £100m target, for a range of projects - from research into how microbubbles can cure cancer to supporting scholarships for students who wouldn't otherwise have been able to come to University.

As the Finance and Donations Coordinator, within the Alumni & Development team, you will be responsible for overseeing and co-ordinating all departmental finances including donations management and office expenditure. With a background in finance you will also possess excellent communication, interpersonal and team working skills. You will be highly proactive and self-motivated, with a keen attention to detail and a desire to deliver a high quality service.

The Alumni & Development Office (A&DO) currently has 42 members of staff and an annual budget of £3.5 million.



## What does the role entail?

As the Finance and Donations Coordinator your main duties will include:

- Responsibility for the co-ordination of all departmental finances including donations, A&DO-generated non-philanthropic grant funding and office expenditure;
- Through oversight of the Database & Gift Processing Assistant (DGPA), responsible for the accurate processing and cashing of donations, of a range of values and types (from countries worldwide), to the University of Leeds, recording gifts on the Raisers Edge database and allocating to the relevant “restricted” or “unrestricted” accounts;
- Working closely with Relationship Managers, Treasury and Stewardship, to ensure accurate donor/donation management, co-ordinate the setting up of endowments and the processing of gifts of shares, including notification of value at point of transfer and sale, or investment, as per donor wishes and/or advice from Treasury;
- Ensuring the accurate generation, recording and storing of all documentation relating to gifts in accordance with applicable policies and legislation;
- Collaborating with Central Finance, Stewardship staff and faculty finance contacts, process journals and internal transfers to ensure the timely, relevant and accurate movement of funds in accordance with donor wishes and financial regulations, updating the appropriate records;
- Co-ordinating monthly and quarterly budget review/re-adjustment exercises and working with Central Finance and the Head of Development Services (HODS), coordinate the year-end exercise of reconciling budget and fundraising accounts, ensuring restricted and unrestricted funding regulations are adhered to;  
Assist the HODS with the budget element of the yearly Integrated Planning Exercise (IPE);
- Supporting section heads with general budget allocation and expenditure enquiries through, amongst other things, the production of regular finance reports including weekly expenditure line items and month-end budget updates;
- Advising office colleagues with purchase card enquiries;
- Responsibility for the production of a range of donation reports in order to track income against pledges & forecasts, support fund dispersal committees and



- supporter activity, and participate in benchmarking exercises. Constantly assess evolving business needs, creating new reports when required;
- Proactively supporting and developing systems for colleagues across campus to report the receipt of donations, pledges and instalment payments (against pledges). Provide expertise and assist cross-campus colleagues with the philanthropic qualification of income, eligibility of Gift Aid and general donation enquiries;
  - Responsibility for setting up new vendors and for overseeing purchase orders and invoice payments. Acting as the interface between university departments and external partners & suppliers, respond to queries and, ensuring adherence to University policies and procedures, take the appropriate action to resolve any issues;
  - Keeping abreast of relevant financial rules, regulations and working practice, acting on and implementing any relevant changes and briefing A&DO staff;
  - Identifying inefficiencies and issues, make recommendations for improvements to systems and processes, briefing relevant staff on any changes implemented. Working with fundraising teams, research and implement new methods of giving (donating) to the UoL. Develop and maintain gift & finance procedures and work instructions so that tasks may be performed during absences of leave;
  - Responsibility for overseeing the production and submission of Gift Aid claims, carrying out frequent Gift Aid paperwork audits and undertaking regular exercises to maximise on Gift Aid, identifying unclaimed funding from qualifying donations/donors;
  - Any other duties commensurate with the nature & grade of the post.

These duties provide a framework for the role and should not be regarded as a definitive list. Other reasonable duties may be required consistent with the grade of the post.

## **What will you bring to the role?**

As the Finance and Donations Coordinator you will have:

- In-depth understanding of Income and Expenditure account management and policies including restricted and unrestricted principles, monthly reconciliation, accrual adjustments and financial year-end requirements;



- Ability to demonstrate a competent understanding of basic financial principals (including, sales, purchase and general ledger);
- Experience of finance systems and procedures, including the monitoring of income and expenditure against budget;
- Excellent communication skills, including the ability to explain financial information to non-specialist colleagues;
- Excellent interpersonal, team working and relationships building skills in order to work effectively with a diverse range of people including, A&DO colleagues, central and faculty finance staff, and external stakeholders including 3rd party partners and suppliers;
- Highly proactive and self-motivated, demonstrating excellent organisational and time-management skills in order manage tasks and one's own workload;
- Excellent analytical and problem solving skills with a high degree of initiative in order to identify issues and inefficiencies, recommend and implement solutions & processes, and resolve problems;
- Ability to demonstrate flexibility and adaptability, sometimes working to tight deadlines whilst still delivering a high quality service;
- Excellent attention to detail and accuracy with experience of maintaining confidentiality/handling sensitive information with discretion;
- Excellent IT skills, proficient in MS Office applications (including Excel) with experience of using finance IT systems/software and the ability to learn new systems and processes.

You may also have:

- AAT qualified or equivalent accounting qualification;
- Knowledge of fundraising databases;
- Experience of using SAP finance;
- Experience of using SIPR (SAP Intranet Purchase Requisition) system;
- Experience within a Higher Education environment;
- Experience of overseeing the work of others.

## How to apply

You can apply for this role online; more guidance can be found on our [How to Apply](#) information page. Applications should be submitted by **23.59** (UK time) on the advertised closing date.



## Contact information

To explore the post further or for any queries you may have, please contact:

### **Rob Spencer, Head of Development Services**

Tel: +44 (0)113 343 8494

Email: [r.j.spencer@leeds.ac.uk](mailto:r.j.spencer@leeds.ac.uk)

## Additional information

### **Working at Leeds**

Find out more about the benefits of working at the University and what it is like to live and work in the Leeds area on our [Working at Leeds](#) information page.

### **Candidates with disabilities**

Information for candidates with disabilities, impairments or health conditions, including requesting alternative formats, can be found on our [Accessibility](#) information page or by getting in touch with us at [disclosure@leeds.ac.uk](mailto:disclosure@leeds.ac.uk).

## Criminal record information

### **Rehabilitation of Offenders Act 1974**

A criminal record check is not required for this position. However, all applicants will be required to declare if they have any 'unspent' criminal offences, including those pending.

Any offer of appointment will be in accordance with our Criminal Records policy. You can find out more about required checks and declarations in our [Criminal Records](#) information page.

