

MINNESOTA STATE COMMUNITY AND TECHNICAL COLLEGE		EMPLOYEE'S NAME	
POSITION DESCRIPTION A			
CAMPUS COLLEGE-WIDE MOORHEAD		ACTIVITY BUSINESS OFFICE	
CLASSIFICATION TITLE ACCOUNT CLERK SR.	WORKING TITLE (IF DIFFERENT) ACCOUNTS RECEIVABLE CLERK	POSITION CONTROL NO. 637070	
PREPARED BY	PREVIOUS INCUMBENT	APPRAISAL PERIOD TO	
EMPLOYEE'S SIGNATURE (this position description accurately reflects my current job).	DATE	SUPERVISOR'S SIGNATURE (this position description reflects the employee's current job).	DATE

POSITION PURPOSE

The purpose of this position is to accurately coordinate, monitor and implement the college-wide accounts receivable transactions concerning the processing, billing, and reconciling of third party agency authorizations and the deposits and payments of private and Indian scholarship monies. In addition, this position is to accurately coordinate, analyze and implement the process for verifying and completing college-wide account receivable and financial aid transactions.

REPORTABILITY

Reports to: Business Manager Central Accounts Receivable Office

Supervises: N/A

DIMENSIONS

Budget: Third party agency funds - \$1.5-2.5 million
Private scholarship funds - \$250,000
Indian scholarship funds - \$350,000

Clientele: Students, faculty, staff, administration, funding agencies, scholarship donors

POSITION DESCRIPTION B	EMPLOYEE'S NAME	POSITION CONTROL No. 637070
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Resp. No.	PRINCIPAL RESPONSIBILITIES, TASKS AND PERFORMANCE INDICATORS	Priority	% of Time	Discretion
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1	Customer Service. On a daily basis, execute the M State Service Commitment and Service Standards to ensure all stakeholders have a positive service experience.	A	Ong oing	A
2	Coordinate and implement the processing and billing of third party agency payments. <u>Tasks:</u> <ol style="list-style-type: none"> Serve as liaison between the student and the agency or between the agency and specific MSCTC campus. Analyze the third party agency authorizations to determine which costs are being covered per individual student. Manage agency funding database and forward agency information to campus bookstores, Central Financial Aid Office, and Distance Education. Evaluate individual student account, calculate agency funding amount, and enter proper agency funding amount into student accounting system. Reconcile agency amount on student account against agency authorization paperwork and campus bookstore receipts prior to billing. Correspond with campus bookstore to clarify any bookstore questions. Prepare the invoices to bill the appropriate third party agency and enter invoice on MnSCU accounting system. Code and deposit agency payments to the MnSCU System. Request refunds to agency when applicable. Track unpaid invoices and correspond with agency regarding past due invoices. Reconcile accounting records and student database records with funds applied process. Verify MnSCU PSEO listing for proper coding and credit load for correct reimbursement. Collect PSEO information from campus contacts and verify contract/non-contract status in accounting system. Process PSEO contracts. 	A	50	A
3	Coordinate and implement the deposits and payments of private and Indian scholarship monies. <u>Tasks:</u> <ol style="list-style-type: none"> Receive and deposit monies from private and Indian scholarship donors. Verify that student is eligible to receive scholarship per any specific scholarship guidelines. Request refunds to donor when applicable. Compile bi-weekly any new scholarship payments to be made and enter amount into the student accounting system for payment. Manage scholarship ledger sheets and post all deposits and payments weekly to those accounts. Calculate year-end payment and deposit data for fiscal year account reconciliation with student accounting records and MnSCU account records. <p>Performance Indicator: To be completed bi-weekly to coordinate with financial aid check writing.</p>	A	20	A

POSITION DESCRIPTION B	EMPLOYEE'S NAME	POSITION CONTROL No. 637070
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Resp. No.	PRINCIPAL RESPONSIBILITIES, TASKS AND PERFORMANCE INDICATORS	Priority	% of Time	Discretion
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4	<p>Coordinate student loans to ensure they are correctly recorded on student records and reconciled with Central Financial Aid (CFA).</p> <p><u>Tasks:</u></p> <ul style="list-style-type: none"> a) Coordinates semester aid/funds apply schedule with the Northern Region Computer Center to correspond with accounts receivable timelines. b) Examine the aid/funds apply report and investigate irregularities after each aid/funds apply process. c) Review student's records to ensure that all students receiving loans have the appropriate credit load to be eligible for the loan. Review for financial aid funds being reduced and submit a billing to the student. d) Compile spreadsheet to ensure accurate federal funds draw downs and general ledger balancing. e) Weekly monitor SELF loans received to equal SELF loans disbursed to the student. Review aid/apply report for failed conditions and report to financial aid personnel. f) Maintain accurate, individual student accounts making manual computer adjustments when necessary to balance with financial aid information. Cancel checks and adjust accounts for financial aid recapture when necessary. g) On a semester basis, reconcile with Central Financial Aid to ensure all loans have been disbursed or returned. h) Annually reconcile with Central Financial Aid to ensure all records are in agreement with financial aid systems. <p><i>Performance Indicators: To be completed weekly to coordinate with financial aid check writing. Timely and accurate grant and loan reconciliation's done on a semester basis.</i></p>	A	20	A
5	<p>Monitor/reconcile financial aid awards on student accounts in the ISRS system on a weekly basis.</p> <p><u>Tasks:</u></p> <ul style="list-style-type: none"> a) Reconcile the Pell, SEOG, and the Minnesota State Grant reports with Central Financial Aid to ensure that accounts balance. b) Notify students of any grant changes on their account. c) Review for financial aid funds being reduced and coordinate a billing to the student <p><i>Performance Indicators: To be completed on a weekly basis to coordinate with financial aid check writing. Ensures information provided is timely and accurate.</i></p>	A	5	A
6	<p>Provide other business office functions as assigned.</p> <p><u>Tasks:</u></p> <ul style="list-style-type: none"> a) Provide general business office information to students. b) Assist other Central Accounts Receivable personnel when needed. c) Assist with billing and deposits for Custom Training students. d) Process employee tuition waivers. e) Process campus student uniform fees with various departments. f) Special projects as assigned. g) Distribute emergency loan checks. <p><i>Performance Indicators: To be accomplished in a timely manner.</i></p>	A	5	A

POSITION DESCRIPTION C	EMPLOYEE'S NAME	POSITION CONTROL No. 637070
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Nature and Scope (relationships; knowledge, skills and abilities; problem solving and creativity; and freedom to act.)

RELATIONSHIP:

This position communicates on a daily basis with students and outside funding agencies. Also this position must interact closely with the personnel from all five campus that work in the bookstores, business offices, and financial aid offices. This communication is done by telephone, letters, in person or by E-mail.

KNOWLEDGE, SKILLS, AND ABILITIES:

▪ **Position Qualifications:**

- › Customer service skills sufficient to meet the M State commitment and service standards.
- › English sufficient to fluently speak, write, read, understand and be understood in responding to a variety of written and oral communications, detailed instructions and procedures.
- › Accounting/Budgeting/Expense skills to accurately track and record budgets to ensure accurate record budget transactions, payment of all invoices, expense vouchers, and supply and equipment orders.
- › Bookkeeping sufficient to maintain accurate financial records.
- › Typing/Keyboarding skills sufficient to produce legal documents, letters, and reports.
- › Data Entry Performance skills sufficient to accurately enter data into spreadsheets and databases.
- › Word Processing sufficient to quickly and accurately produce business letters, memos, transcripts, reports, using proper business grammar, spelling, and usage.
- › Spreadsheets sufficient to maintain data and produce monthly benefits reports.
- › Data Base Management skills sufficient to develop and correctly enter information in a database and to produce ad-hoc queries and develop reports for management use.
- › Physical Demands (sitting for extended periods of time).

▪ **Preferred Qualifications:**

- › Two years of formal education after high school or a two year degree/diploma in accounting.
- › Three years work experience in accounting field.
- › Knowledge of college, agency, federal and state policies and procedures.
- › Ability to prioritize work, to be self-motivated, and to decide what tasks must be done to carry out work assignments and what materials, equipment, and/or information are needed.
- › Ability to complete detailed work accurately under pressure and to meet deadlines.
- › Proficient in oral, written and electronic communication.
- › Ability to develop a collaborative and professional relationship with college personnel and customers.

PROBLEM SOLVING:

This position requires the ability to identify and determine problems in regard to the student accounts and the agency funding authorizations and to take appropriate action. This position also recognizes problems in relationships with the funding agencies, determines the solution and takes appropriate action to resolve the issue.

FREEDOM TO ACT:

The incumbent is free to act within college procedures and policies with limited supervision.

**Minnesota
State Colleges and Universities**

**EXCLUDED STAFF
POSITION DESCRIPTION**

FOR PERSONNEL OFFICE USE ONLY

Benchmark:
Title: MnSCU Administrator
Current Range: 2
Range Description:
Date Range Approved: October 23, 2012
PCN: 633380

Employee Name: _____

College/University: Minnesota State Community & Technical College

Department & Program: College-Wide Location TBD

Position Title: Chief Development and Alumni Officer

Assignment Specialty, if applicable: _____

Employee Signature: _____ **Date:** _____

Note: You must include an organizational chart with this position description.

Supervisor's Signature: _____ **Date:** _____

Supervisor's Title: President

**Appropriate President/Vice President/
Vice Chancellor or College/University**

Designee's Signature: _____ **Date:** _____

College/University Designee's Title, if applicable: _____

REQUISITE QUALIFICATIONS:

(Enter minimum number of years of formal education and/or experience that is required for this job. Do not list preferred qualifications, or your own current educational qualifications.)

Education: Bachelor's Degree in related field

Professional Licensure/Certification:

Experience: Minimum of 3 years of related experience

Type of experience:

- ▶ Fundraising experience with demonstrated success in securing outright and deferred major gifts from individuals, corporations and small businesses.
- ▶ Demonstrated experience in donor/prospect cultivation and solicitation—including volunteers

- ▶ Strong written, presentation and oral communication skills
- ▶ Ability to understand, manage and communicate financial information
- ▶ Ability to work with four separate foundations in four different communities and coordinate activities to reduce unnecessary duplication, maximize efforts, maintain strong and proven strategies, and increase opportunities across the region
- ▶ Ability to independently make effective decisions based on facts and proven strategies
- ▶ Excellent leadership and management skills and attention to detail
- ▶ Knowledge of organizational systems and aptitude for analysis of detailed data
- ▶ Commitment and enthusiasm with a wide variety of constituents
- ▶ Demonstrated strong interpersonal skills

Other Special Requirements: (Preferred Qualifications)

- ▶ Knowledge and familiarity with the northwest region of the State of MN
- ▶ Experience in managing major giving campaigns for scholarship purposes and capital campaigns
- ▶ Knowledge of gift planning strategies
- ▶ Experience providing leadership in a non-profit environment
- ▶ Professional work experience in an educational environment
- ▶ Advanced degree in a related field such as business, marketing or public administration or considerable advanced coursework in related areas of study
- ▶ Successful supervisory experience
- ▶ Familiarity with the M State philanthropic community
- ▶ Comprehensive knowledge of non-profit organization financial and accounting processes and charitable giving laws such as IRS code 501c(3) and/or Professional Licensure/Certification: Certified Fund Raising Executive (CFRE)

QUALIFICATIONS FOR APPOINTMENT:

- A. Knowledge, skills and abilities required to perform duties and responsibilities:
- Understanding of and commitment to the Technical & Community College Mission
 - Ability to collaborate successfully with internal and external entities in accomplishing funding goals
 - Ability and experience developing strong positive relationships with senior management and CEO's in the business and government community
 - Ability to carry out responsibilities with the highest ethical standards
 - Excellent public presentation, written, and verbal communication skills
 - Knowledge and ability to develop and lead institutional advancement initiatives
 - Successful face-to-face solicitation experience
 - Successful grant proposal and writing experience
 - Ability to organize time, set priorities, and carry out multiple responsibilities
 - Ability to make independent decisions regarding highly sensitive matters and to maintain confidentiality
 - Knowledge of federal, state, local, and private grant development in higher education including understanding of U.S. Department of Education funding protocols

- Ability to apply complex federal and state regulations and laws governing non-profit organization
- Knowledge of strategic planning methods and principles
- Experience in non-profit fund raising and donor management software
- Managerial and human relation skills including the ability to bring constituencies together in accomplishing common goals
- Knowledge of current theories and best practices of resource development in higher education
- Ability to direct the Foundation in meeting fiscal audit requirements
- Ability and knowledge to adhere to high professional standards that reflect a collaborative approach to foundation and fund raising activities

- B. Physical requirements (*e.g. lifting and carrying equipment and materials, required overnight travel*):
- Some overnight travel is required.

DIMENSIONS:

(Attach detailed organizational chart which clearly indicates reporting lines and supervisory responsibilities.)

Budget:

- Salary: \$ _____
- Operating: \$1.5 to \$2.0 million (fiduciary relationship) _____

Direct Supervision: *(This refers to the number of supervisees that you directly supervise. Note: Do not include leadwork or functional supervision.)*

- # FTE Employees: 4 _____
- # FTE Students: 0 _____ (based on 15 credit load)

Position Assigned to Work:

indicate number of months per year: 12 months/year;

indicate whether full or part-time: ☒ full time; ☐ part-time

POSITION SUMMARY:

(One or two sentences summarizing the primary purpose for which this position exists):

This position exists to provide leadership and take responsibility for the comprehensive institutional advancement program and alumni development for the College. This includes working together with campus development directors to maximize efforts and reduce unnecessary duplication, maintain proven development strategies and improve others. The main purpose of this position is to further develop and expand private financial support for the college and its students and lead and expand alumni affairs. This position will develop relationships with the external and internal college communities, oversee fundraising and alumni activities and coordinate marketing efforts for the College in conjunction with the College marketing plan.

This position reports directly to the college President. This position will work in close collaboration with the Foundation Board, the President and the Cabinet in developing and executing strategic fund raising plans. This position involves significant discretion and substantial involvement in the development, interpretation and implementation of M State and MnSCU policy and procedure.

The Executive Director is responsible for the day-to-day management of the resource development operations. The incumbent is expected to provide active leadership for achieving the College's fund raising goals, by cultivating, soliciting and stewarding annual, capital and endowment major gifts. He/she is also responsible for providing leadership and management to all major fundraising efforts, including the creation of a strong alumni relations program which will be key for future fundraising successes.

DUTIES AND DELEGATED RESPONSIBILITIES:

(Percent of time should reflect time over the course of a year. Use additional sheets as necessary to provide a detailed description of these responsibilities. Please identify any special work conditions such as the requirement to "live-in", on-call duty, evening assignments, etc.)

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
1	30	<p>Provide leadership and expertise to the M State Foundations and the College President in efforts to raise funds to support the college mission.</p> <ul style="list-style-type: none"> a) Serve as the Executive Director of the M State College Foundations and as the primary advisor to the college President and Cabinet on Foundation related issues; b) Advise and participate with the Foundation Boards of Directors in strategic planning including determining strategies for achieving Foundation goals and coordinating these with the college strategic plan; c) Lead the Foundation and Alumni Development Unit in creating and implementing major and planned giving programs, capital campaigns and other donor programs; d) Identify, recruit and manage a committee or group of leadership volunteers to assist with capital campaign efforts; e) Serve as the primary liaison between the Foundation Boards of Directors, the President and Cabinet; f) Develop positive relationships with senior executives of private funding sources and represent the College and Foundation in obtaining gifts on behalf of the college; g) Manage relationships and solicit individuals for philanthropic support of the College; h) Establish productive and positive local and area media relations to promote media coverage of Foundation activities in conjunction with College Director of Marketing; i) Develop methods, checks and balances to assure Foundations compliance with state and federal financial and other reporting requirements; j) Develop, recommend and implement M State and MnSCU policies and procedures for college development and alumni relations.

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
2	30	Plan, direct, lead and participate in all fundraising and development programs and events
a)		Plan and implement major gift and capital campaigns;
b)		Coordinate and prepare all fundraising calls – cultivation and solicitation - for the President and Foundation Board members;
c)		Manage a portfolio of major gifts prospects to ensure timely steps are taken toward solicitation;
d)		Create and manage a resource development program for the college;
e)		Provide direction and process for administrators and faculty in analyzing and establishing resource development needs and priorities;
f)		Plan and execute major College and Foundation fundraising events that facilitate and encourage giving in support of Foundation goals and the College's Strategic Plan;
g)		Create systems and oversee accurate donor records;
h)		Supervise administrative staff in coordination and maintenance of accurate donor, alumni and other constituent records;
i)		Oversee stewardship for college donors.
j)		Develop, recommend and implement M State and MnSCU policies and procedures for college development and alumni relations.

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
3	20	Design, implement and manage alumni and volunteer development for the college
a)		Develop and manage an Alumni Association to support the college, including establishing an annual alumni appeal and alumni newsletter;
b)		Plan and implement Alumni Association programs and other events that support the objectives of the Association;
c)		Create systems and oversee Alumni Association records;
d)		Coordinate and promote media coverage of Alumni Association activities with the Marketing and Public Relations Departments;
e)		Provide support and technical expertise and direction to the Alumni Association in its strategic planning and coordinate this with the college and foundation strategic planning efforts.
f)		Develop, recommend and implement M State and MnSCU policies and procedures for college development and alumni relations.

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
4	10	Secure partnerships with and plan, implement and manage public, community and business sources of funding
a)		Establish and maintain cordial and productive relationships with current and prospective public, government and business funding sources in order to create a positive climate for support;
b)		Monitor public policy discussions and decisions and advise the Cabinet about initiatives by state and federal funding agencies that would be favorable to the college;
c)		Promote the Foundation and the College to business, government and other organizations;

- d) Develop initiatives and relationships that create and maintain a positive image of the college in the community;
- e) Conduct research to identify economic development needs that can be met through partnerships with the Community, business and other public entities and lead the initiatives for implementing partnerships.

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
5	5	Provide supervision and leadership to department staff so that all applicable labor agreements and plans are equitably administered and employee performance maximized.

- a) Perform all hiring functions, make final hiring decisions and evaluate probationary periods;
- b) Establish work schedules, assign work responsibilities and set priorities;
- c) Evaluate staff performance annually in relation to individual and unit objectives;
- d) Administer state employee plans and contractual bargaining agreement provisions including hearing and making determinations on first step grievances;
- e) Reward employees by Letters of Commendation, granting discretionary bonuses, and by other appropriate means or take corrective action, including oral and written reprimands;
- f) Contribute to College's Affirmative Action and diversity goals in hiring.

<u>Resp. #</u>	<u>% Time</u>	<u>Description</u>
6	5	Other duties as assigned
<ul style="list-style-type: none"> a) Serve as a member of the Management Team b) Participate in college administrator's committee meetings and serve on other committees and task groups as assigned; c) Maintain communication with MnSCU staff and other system administrators in similar areas of responsibilities; d) Participate in state, regional and national professional groups related to responsibilities; e) Plan and implement other college events as assigned; f) Assist in the development of the colleges Strategic Plan; g) Serve as a member of local community organizations to help promote M State and its campuses. 		

This description is intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position will be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under her/his supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind of level of difficulty.