

University of Alberta
Office of Advancement - Recording Secretary
Senior Agreements Advisor

Competition No. - **S113137932**

Posting Date - **Jul 08, 2019**

Closing Date - **Sep 20, 2019**

Position Type - **Full Time - Operating Funded**

Salary range - **\$62,877.36 to \$87,627.24 per year**

Grade - **11**

Hours - **35 per wk**

This position offers a comprehensive benefits package which can be viewed at: [Faculty & Staff Benefits](#).

Ideas. Talent. Purpose.

At the University of Alberta, we begin with people - people with ideas, talent, and purpose. We seek knowledge. We educate citizens. We ask the big questions. We push the limits of human understanding and knowledge. We engage with partners and communities close to home and around the world to lead positive change. We empower creative purpose to take risks and make imaginative leaps towards as yet undetermined futures.

A career in Advancement at the University of Alberta positions you as a key player in creating this future. Bring your passion for relationship building and your belief in the power of philanthropy to the University of Alberta, and help deepen our dedication to excellence and extend our record of public leadership by playing a lead role in building a better province, a better Canada, and a better world.

The Office of the Recording Secretary and the Office of Advancement is seeking a Senior Agreements Advisor, who leads the process of accepting donations on behalf of the University, and works closely with donors and internal stakeholders to ensure the timely and accurate recording of commitments.

Reporting to the Associate Director, Agreements and Processing, the Senior Agreements Advisor requires an advanced level of understanding of the Canada Revenue Agency's (CRA) gift receipting policies, and the University of Alberta's Donation Acceptance policies and procedures. The Senior Agreements Advisor will effectively negotiate and evaluate complex agreements while balancing the needs of a wide range of stakeholders.

Duties

- Utilizes knowledge of Trust Law, University of Alberta Counting Guidelines, University of Alberta Policies and Procedures, GAAP and CRA requirements to ensure the appropriate setup and recording of philanthropic support
- Negotiates and achieves agreement from multiple stakeholders to create governing documents for endowed and other restricted funds including Donation Agreements, Terms of Reference, and Statement of Trusts
- Works directly with executors of an Estate, their next of kin, or their legal representative to accept donations left to the University via a legacy
- Administers the process of creating endowments and other restricted funds
- Acts as the subject matter expert on the process of accepting and administering donations to the University

- Collaborates with Student Financial Support and the Faculty of Graduate Studies and Research in the establishment of new scholarships, bursaries and awards funded by philanthropy
- Evaluates and ensures the appropriate recording of funds included in the Universities Fundraising Achievement
- Reinforces appropriate procedures for the maintenance, safekeeping, and accessibility of permanent records of donation
- Maintains knowledge of legislation and regulations that pertain to charitable contributions
- Prepares financial forecasts and completes ad-hoc financial reporting
- Ensures year end and other periodic deadlines for financial reporting, charitable tax reporting, and fundraising achievement are met
- Provides advice and recommendations to senior leadership

Qualifications

- The ideal candidate will have a university degree in Finance, Accounting, Administration or Law; minimum degree required
- Certified Professional Accounting (CPA) designation OR a Certified Fundraising Executive (CFRE) designation OR be a member of the Canadian Association of Gift Planners AND/OR be a member in good standing of the Law Society of Alberta are preferred
- 5+ years experience in Finance, Accounting, Law, or a fundraising environment dealing with complex gift agreements, planned giving, or estate administration
- 5+ years experience with financial systems in the charitable, education or government sectors
- Possess high level analytical, problem solving, and critical thinking skills
- Demonstrated understanding of Trust Law as it relates to the setup and administration of endowments
- Knowledge of Charitable Tax Receipting requirements and Generally Accepted Accounting Principles
- Proven ability to work effectively, influence, negotiate and collaborate with stakeholders of all levels, including University Executives, the Board of Governors, Faculty, Alumni and Donors while dealing with complex and sensitive donation agreements
- Knowledge of University of Alberta policies, procedures and operating requirements is strongly preferred
- Excellent planning, organizational, and time management skills
- Ability to work independently to meet all financial reporting deadlines
- Ability to be a contributing member of a multidisciplinary team

Interested applicants may apply [here](#).

The University of Alberta is committed to an equitable, diverse, and inclusive workforce. We welcome applications from all qualified persons. We encourage women; First Nations, Métis and Inuit persons; members of visible minority groups; persons with disabilities; persons of any sexual orientation or gender identity and expression; and all those who may contribute to the further diversification of ideas and the University to apply.