

# POSITION DESCRIPTION

## Financial Operations Lead (Philanthropy)



WESTERN SYDNEY  
UNIVERSITY



### POSITION DETAILS

Position Title	Financial Operations Lead (Philanthropy)
Classification	Hew Level 7
Position Number	7008841
School/Office	Office of Advancement
Division	Western Sydney & External Engagement

### POSITION PURPOSE

The Financial Operations Lead (Philanthropy) is the University's central point of oversight for the accurate processing, reconciliation, management, and reporting of philanthropic gifts, pledges, payments, and funds.

The role supports institutional philanthropic goals by strengthening internal systems, improving the donor experience and protecting donor intent, safeguarding legal and policy compliance, and enabling accurate financial stewardship across all advancement activities.

This role also coordinates operational activities around budget and payments across the Division of Western Sydney and External Engagement (WS&EE), within the Office of Advancement and is a donor-facing position. Working in close partnership with the Deputy Vice-Chancellor (WS&EE), central Finance and ITDS this position serves as the single source of truth for all Divisional, gift and fund related processing, enquiries, and reporting.

### KEY ACCOUNTABILITIES

#### 1. Gift Processing and Administration

- Oversee and coordinate all aspects of philanthropic gift processing from payment, including online, and receipting through to allocation to funds and disbursement in accordance with donor intent and University policy.
- Process, validate, and record all gifts, pledges, and other revenue in the Raiser's Edge CRM ensuring correct fund, appeal and campaign coding and compliance with Finance systems and reconciliatory processes.

#### 2. Philanthropic Funds Management and Reporting

- Establish, maintain and update fund records, pledge schedules and instalments, and fund usage rules working with central Finance to maintain accurate current fund balances for internal and donor-facing purposes.
- Administer scholarship, endowed and other fund accounts, including monitoring balances and payment schedules coordinating a monthly journal to disburse donated funds in alignment with donor intent and agreement conditions.
- Produce accurate pledge ageing and arrears reports, fund statements, reconciliation reports, and resolve discrepancies.

### **3. Donor Stewardship and Revenue Protection**

- Work closely with colleagues in the Office of Advancement to ensure scheduled donor payments, invoicing, acknowledgements, reporting, and stewardship activities meet donor expectations and are aligned with donor agreement obligations.
- Supply timely validated gift, pledge, and fund data extracts for operational and stewardship reporting (e.g. annual reports, fund statements) and bespoke donor reporting communicating directly with donors where required.

### **4. Budget and Forecasting**

- Working with the Executive Director, Advancement, to coordinate the preparation and management of the Office of Advancement operating budget and develop and maintain philanthropic revenue forecasts.
- In coordination with the Executive Director, Advancement, act as liaison with the Office of the Deputy Vice-Chancellor Western Sydney & External Engagement and the Office of Finance for Advancement budget and forecast submissions.
- Working with the Deputy Vice-Chancellor (WS&EE) and respective divisional areas to manage budgets and forecasting, and input into relevant systems.

### **5. Compliance, Risk Management, and Continuous Improvement**

- Own and document end-to-end gift and fund management processes.
- Maintain up-to-date knowledge on legislative, tax and accounting requirements relating to philanthropic giving.
- Monitor and address any risks related to gift and payment processing.
- Partner with ITDS, central Finance and external vendors to ensure the Raiser's Edge CRM system and payment systems are integrated or align correctly with other University systems and platforms.
- Identify system, process, or training improvements to enhance efficiency, reduce risk and reliance on corporate knowledge held by individuals.

### **6. Undertake other duties as directed**

- Act as the subject-matter expert for gifts, funds, budget and forecasts, and payments on behalf of the Office of Advancement.
- Coordinate bespoke student payments where required and journals ensuring appropriate approvals are obtained.
- Other duties relevant to the classification level.

## **QUALIFICATIONS, EXPERIENCE AND SKILLS**

1. Degree in Accounting, Finance, or Business Administration, or a related field or an equivalent combination of relevant experience and training.
2. Demonstrated experience in philanthropic gift processing and fund administration, budget management including revenue forecasting, financial stewardship and reconciliation within a higher education or not-for-profit environment.
3. Strong understanding of gift lifecycle, donor intent, compliance frameworks, and reporting obligations with the ability to deal with donors directly in a manner that enhances their relationship with the University.
4. High level of proficiency with data/CRM systems (e.g., Raiser's Edge, or similar) and financial systems integration including online payments systems and receipting, TM1 and Oracle experience preferred, but not essential

5. Excellent attention to detail, process orientation, and capacity to manage complex data sets with accuracy and auditable financial rigor.
6. Strong interpersonal skills with the ability to collaborate across teams and communicate technical information clearly to non-financial stakeholders and impact of giving with donors.
7. Knowledge of relevant legal, tax and governance frameworks relating to philanthropy and donations.
8. Passion for the university's mission, proactive and self-starting attitude, creativity in fundraising approaches, and adaptability to a dynamic environment.

## KEY RELATIONSHIPS

This position reports to the Executive Director, Advancement.

This position has no supervisory responsibilities.

Success in the role will be dependent on developing and maintaining positive relationships with:

1. Deputy Vice-Chancellor, (WS&EE)
2. Executive Director, Advancement
3. Director of Operations (WS&EE)
4. Development Team, Office of Advancement
5. CRM and Reporting Coordinator, Office of Advancement
6. Advancement Office colleagues
7. Finance Office and functions
8. Division of Western Sydney and External Engagement
9. Other internal stakeholder including Faculties, Schools, Institutes and Centres, Research Office
10. External stakeholders including donors, vendors and suppliers.

## CHALLENGES

### **Maintaining absolute accuracy and integrity across complex gift and fund transactions**

The role is the single point of oversight for end-to-end gift processing, reconciliation, and fund management. A key challenge is ensuring consistently accurate coding, allocation, reconciliation, and reporting across multiple systems (Raiser's Edge, Finance systems, online payment platforms), while managing high volumes, complex gift structures, instalments, pledges, and donor-specific conditions. Any errors risk financial misstatement, donor dissatisfaction, or compliance breaches

### **Protecting donor intent while balancing operational and financial constraints**

Administering scholarships, endowed funds, and restricted gifts requires careful interpretation and enforcement of donor agreements over time. The challenge lies in ensuring funds are disbursed exactly as intended, even when operational realities, changing priorities, or system limitations create pressure to diverge from original conditions. This requires strong judgement, diplomacy, and rigorous documentation

### **Operating as a trusted intermediary across Advancement, Finance, IT, and donors**

The role sits at the intersection of multiple stakeholders with different priorities. A key challenge is managing expectations, resolving discrepancies, and translating complex financial or system issues into clear, actionable advice for non-financial colleagues and donors, while maintaining credibility with central Finance and ITDS as the "single source of truth"

### **Ensuring compliance in a highly regulated and risk-sensitive environment**

Philanthropic giving is governed by tax law, accounting standards, donor agreements, and internal policy. The role must continuously monitor compliance risks, stay current with legislative and regulatory changes, and ensure that processes are auditable and defensible. This is particularly

challenging in an environment of evolving systems, increasing philanthropic ambition, and heightened scrutiny

**Driving system and process improvement while sustaining business-as-usual delivery**

The role is expected to document processes, reduce reliance on corporate memory, improve system integration, and uplift capability across Advancement. The challenge is achieving continuous improvement and change while still delivering time-critical operational outcomes such as receipting, reporting, budget coordination, and donor communications, often with limited capacity or resources

## UNIVERSITY EXPECTATIONS

The University expects that all employees are aware of, and comply with legislation and Western's policies and procedures relevant to the position, including but not limited to:

- Code of Conduct
- Work Health and Safety and Wellbeing Management System
- Enterprise Agreement or Award
- Anti-discrimination principles, Equal Employment Opportunity and staff and student equity.

**Approved by: HR Lead Eileen Jensen**

**Date: 27 January 2026**