

# The University of Texas at San Antonio

## *Job Description*

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Job Title: Endowment Compliance Coordinator  
Code: 16439  
Salary Grade: 60  
FLSA Status: Exempt  
Department/Division: Operations & Advancement Services/External Relations  
Reports To: Director of Endowment Services

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## *Summary*

- Function: To provide specialized skills related the acceptance, management, reporting, and endowment compliance for university.
- Scope: Responsible for coordinating activities related to the acceptance, management, reporting, and compliance for UTSA's comprehensive Endowment Compliance Program in compliance with Federal, State, and UT System accounting principles, regulations and guidelines.

## *Duties*

- Typical:
  1. Reviews and edits donor endowment instruments and other donor gift acceptance request in coordination with university-wide constituents.
  2. Monitors central endowment funds to ensure spending is in compliance with the agreement and the donor's intent.
  3. Mediates endowment compliance issues and develops controls to minimize endowment risks.
  4. Reviews donor endowment-related reports for accuracy and timely submissions; reviews and edits annual report templates.
  5. Prepares endowment compliance reports for external report requirements; prepares and submits UT System annual report.
  6. Coordinates responses with other UT system offices and general counsel as appropriate.
  7. Evaluates and assists in developing new institutional policies and procedures.
  8. Provides guidance and expert interpretation of policies and procedures to minimize potential adverse impact.
  9. Ensures adherence to endowment provisions, applicable laws, policies and rules; monitor progress and management responses from UT institutions.
  10. Researches and responds to inquiries from other institution, administration

- and donors regarding compliance issues;
11. Develops and conducts training to appropriate development staff on best practices, endowment administration and compliance issues.
  12. Performs other duties as assigned.

***Education***

<b>Required</b>	<b>Preferred</b>
Bachelor's degree in Accounting or Business, from an accredited institution.	N/A

***Other Requirements***

<b>Required</b>	<b>Preferred</b>
Ability to read, interpret and write financial reports in a prescribed format and effectively present information to senior management.	N/A
Strong interpersonal and communication skills and the ability to work effectively with a wide range of constituencies in a diverse community.	
Ability to interpret, analyze, and advise on the application of compliance laws and regulations as appropriate.	
Ability to write reports containing technical information.	
Knowledge of federal, state, and university compliance laws, guidelines, and procedures.	
Criminal Background Check (CBC).	

***Experience***

<b>Required</b>	<b>Preferred</b>
Three years of progressively responsible professional accounting experience to include working with endowment and gift accounting OR Five years in financial reporting, audit and compliance, development or in in closely related field.	Five or more years of relevant experience in higher education.

***Equipment***

<b>Required</b>	<b>Preferred</b>
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Use of personal computer, Microsoft Office, and standard office equipment. Experience with PeopleSoft.	Working knowledge of Oracle based database software and tools. Experience with Raiser's Edge.
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***Working Conditions***

<b>Usual</b>	<b>Special</b>
Normal office environment.	May require some travel, evening and weekend hours.

***Supervision***

<b>Received</b>	<b>Given</b>
General supervision from the Director of Endowment Services	May provide general instructions to support staff and volunteers.

***Accuracy***

Proficiency in all phases of duties performed.
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***Security Sensitive***

Specific job requirements or physical location of some positions allocated to this classification may render the position security sensitive, and thereby subject to the provisions of section 51.215 Texas Education Code.
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***Internal Control***

Within the scope of position duties, responsible for seeing that operations are effective and efficient, assets are safeguarded, reliable financial data is maintained, and applicable laws, regulations, policies, and procedures are complied with.
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