Job Description: The Director of Advancement and Donor Services

SUMMARY STATEMENT

The Director of Advancement and Donor Services is responsible for the management and oversight of the following major areas within Advancement—Donor Relations, Advancement Services, Research, Gift Accounting, and Prospect Strategy. The Director will serve as the primary liaison for gift and donor records, gift accounting, and implementing an institution-wide comprehensive donor relations and stewardship program.

Reporting to the Chief Development Officer, the Director will oversee an Advancement Associate to ensure the overall management of all strategic planning and procedures involving advancement gift processing, biographical and financial records maintenance and reconciliations, donor relations and stewardship, data oversight, quality control, and strategic reporting. Additionally, The Director will drive operational metrics and reporting throughout the department to ensure disciplined approach to goals.

This position, an integral part of UTEC advancement’s efforts, will create and drive donor stewardship programs, events, and oversee written materials to aid in the efforts to educate, cultivate, engage, and recognize donors at all levels.

The Director will ensure that records are accurately maintained through the development and implementation of policies and procedure manuals across both Donor Relations and Advancement Services. This includes biographical data entry, gift processing and monitoring all data on a regular basis so that all areas of gift and donor records and gift compliance and reporting support the UTEC fundraising effort. The Director will also drive prospect management and pipeline development. The Director will bring a strategic planning approach to regular meetings, and goal setting with senior leadership.

Essential Responsibilities - With broad latitude for independent action, the Director will:

40% Gift and Donor Records, Gift Accounting and Report Management

- Oversee the planning and evaluation of the technology infrastructure necessary to promote and sustain advancement and engagement activities. Serve as a liaison with vendors and encourage and enforce greater use of technological platforms, tools, and metrics to maximize efficiency and accountability across the advancement team.
- Ensure training initiatives across the division.
- Drive a clean and smooth monthly reconciliation with forecasting between the advancement department and finance.
- Provide overall management of development services to include receipt and recording of individual gifts to UTEC.
- Partner with Finance department to ensure accurate reconciliation and strong interdepartmental relationship. Manage the compliance and ethical standards of the Advancement Services department.
• Ensure the timely and accurate data entry of gifts and/or biographic information, including gift coding, fund compliance, as well as compliance with IRS regulations of gift substantiation, GASB regulations, CASE guidelines for development accounts as well as school policies and procedures.

40% Donor Relations and Stewardship

• Follow and promote the ethical guidelines set forth in the Association of Donor Relations for Advancement (ADRP), the Association of Advancement Services Professionals (AASP), the CASE Donor Bill of Rights, and the CASE Ethics Guidelines. Stay abreast of privacy issues as they relate to Donor Relations.
• Manage information tracking processes regarding acknowledgement, recognition, ongoing communications, and continued cultivation of past and current major donors to enhance their relationship with UTEC and increase the likelihood of continued contributions. Develop and assess policies and procedures across the division and UTEC that are essential for a comprehensive donor relations program.
• Oversee a systematic and integrated donor relations and stewardship program that encompasses donor recognition events, celebrations, and potential naming dedications. Responsible for consistent, accurate, and appropriate information-sharing mechanisms for stewarding prospects and donors. Proactively support the stewardship responsibilities of the development staff by assisting them in establishing and coordinating individualized stewardship plans for donors to their areas of interest.
• Contribute donor and gift information for the Annual Report, oversee production of the donor honor roll, determine the report recipients, and facilitate the mailing.
• Provide writing and editorial support, advisement, and leadership for the UTEC’s stewardship and donor communications efforts, such as gift agreements, gift renewal letters, special communications, and stewardship plans and letters.

20% Administration- Manage a CRM system that provides oversight for the efficient management and coordination of all development activities related to gift and donor records, research, gift accounting, moves management, stewardship, and quality controls.
• Oversee the Advancement Associate to ensure the functional day to day process of gifts, data entry, social media linking, and other operational activities are complete.
• This includes standardizing internal and external reporting, benchmarking with peer institutions and monitoring best practices. Prepare current and long-range plans, metrics, and advancement services strategies that can optimize fundraising efforts.
• Drive best practices in the implementation of a new CRM functionality to ensure cross training and use of the database, using data to drive decisions, and implementation of a metric-based department of goal setting and moves management.
• Effectively leads an Advancement Associate in creating or ensuring a cohesive and collaborative team capable of achieving identified goals and objectives. Implements management techniques to promote a positive office environment that fosters employee job satisfaction and high morale. Establishes performance expectations and monitors individual and team performance regularly.

MINIMUM QUALIFICATION REQUIREMENTS
• Bachelor’s degree required.
• A minimum of 5 to 7 years of experience with advancement operations/services and understanding of donor relations.
• Familiarity with the Association of Donor Relations for Advancement (ADRP), the Association of Advancement Services Professionals, the CASE Bill of Rights, and the CASE Ethics Guidelines

BASIC QUALIFICATIONS
• Proven record of accomplishment in a comparable environment and demonstrated high energy.
• Strategic planning, business management, organizational development, and organization building skills must be evident.
• Management skills to motivate, direct, and evaluate staff and volunteers to accomplish fundraising goals.
• Demonstrated written communication skills to prepare and edit effective correspondence, business plans, proposals, and creative solicitation materials; demonstrated oral communication skills to make persuasive presentations to individuals and groups.
• Interpersonal skills to work effectively with organizational leadership, staff, donors, prospects, and volunteers. Ability to maintain high level of confidentiality and working relationships with others.
• Demonstrated ability to set priorities and perform under pressure of fast-paced office environment.
• Demonstrated experience in CRM system management and the integration and use of related software programs in support of gift processing, constituent record keeping, and prospect management, metric implementation, moves management.