



---

**DESCRIPTION, DUTIES & EXPECTATIONS OF POSITION**

<b>POSITION TITLE:</b>	DIRECTOR OF ADVANCEMENT SERVICES
<b>PERSONNEL CLASSIFICATION:</b>	ADMINISTRATIVE STAFF, FULL-TIME
<b>DEPARTMENT:</b>	OFFICE OF DEVELOPMENT AND COLLEGE RELATIONS
<b>DEPARTMENT HEAD:</b>	VICE PRESIDENT FOR DEVELOPMENT AND COLLEGE RELATIONS
<b>IMMEDIATE SUPERVISOR:</b>	VICE PRESIDENT FOR DEVELOPMENT AND COLLEGE RELATIONS

**OVERVIEW:** Reporting directly to the Vice President for Development and College Relations, which includes attending operational planning meetings, providing meaningful input with regard to development and alumni records, prospect research and donor relations, the Director of Advancement Services exercises discretion and independent judgement to support the significant work of the Vice President and other fundraisers, which is critical to the overall operations of the College.

The Director of Advancement Services is responsible for the execution of all aspects of the Advancement Services database management process and data reporting, as well as gift entering, recording and categorizing.

S/he will conduct research about potential contribution opportunities, including: prospect identification, and pipeline development for the College's major, principal, and legacy gifts program.

S/he will implement a plan for strategically coordinating donor relations for all development officer portfolio donors.

**ESSENTIAL DUTIES:** Responsibilities may include, but are not necessarily limited to the following:

**DATABASE & GIFTS MANAGEMENT:**

1. Oversee the collection, entry and maintenance of alumni and development data to the Ellucian Colleague database striving to maintain reliable constituent demographic data of alumni, parents and friends. Facilitate the implementation, testing and maintenance of the Colleague products such as Major Donor Module, Planned Giving Module, Recurring

Donations Module, Automated Payroll Deduction Process and the E-Commerce Module. Implement the processes that will enable the Vice President for Development and College Relations and other development staff to better track major donors and prospects and the results of annual fund, capital campaigns and other special campaigns.

2. Serve as the Development Office's liaison with Ellucian Colleague and work with the Ellucian Colleague Solution center and developers to solve any issues that arise. Continue to work with the College's Information Systems Center to convert data and do the clean-up necessary to enable the College to take full advantage of the Ellucian Colleague software. Track issues related to information services, including enhancements to Ellucian Colleague. Keep the Development Office staff apprised about the progress of these requests. Maintain an "issues list" of needs and use this list as a tracking tool and reporting mechanism. Report monthly on the status of these requests.
3. Maintain standards for timeliness of gift entry. Handle checks from the time of their arrival in the Development Office to their delivery to the Business Office to be deposited. Ensure that the gifts are posted to the appropriate outstanding pledge and correct business fund account number, requesting new fund account numbers when they are needed.
4. Determine ongoing opportunities to clean or scrub data for accuracy and completeness. Utilize electronic data updating services available from the U.S. Postal Service and demographic data companies (i.e. Telematch, Blackbaud, etc.) to keep alumni and donor computer records accurate (i.e. addresses, phone numbers, wealth information, etc.).

#### **MAJOR DONOR STEWARDSHIP:**

1. Produce and edit the donor list published in the annual Donor Honor Roll. This entails using the Datatel Recognition Program. This program needs to be set up and maintained on a yearly basis for the Ellucian Colleague System.
2. Provide project management and oversight for the annual calendar mailing to donors.
3. Oversee that donors are properly entered into the McMichael Heritage Circle, the College's highest level of acknowledgement, and maintain the data records associated, sending appropriate correspondence.
4. Assisting the Assistant Vice President for Development and Legacy Giving (AVP), prepare and coordinate the distribution of the Endowed Scholarship and Prize Reports, as well as coordinate a plan for the execution of the student scholarship thank you notes and any special events for student scholarship recipients.
5. Working with other members of the department and/or College community, and with direction from the AVP, organize and implement special donor-driven and donor recognition events throughout the year to include, but not limited to Endowed Lecture Series, Scholars Day, Annual Donor Appreciation Events during Golden Scots and Homecoming, President's Annual Holiday Reception.
  - a. Develop planning timeline and coordinate necessary venues, food, audio/visual, print materials, entertainment, etc.

(6/29/2022)

- b. Send timely notices to target audiences to market events, as well as for post-event follow-up.
- c. Track reservations and maintain appropriate records within the shared drive and database.

**PROSPECT RESEARCH:**

1. Manage the prospect research and portfolio assignments of the Development Office, to include:
  - a. Employing advanced research data collection and analysis skills (using public, proprietary, purchased or leased databases, published materials and other resources) to proactively identify, research, and assess the philanthropic giving capacity of prospective donors.
  - b. Analyze the wealth and assets, giving interests, backgrounds, and Monmouth College relationships of individuals, corporations and foundations.
  - c. Set standards and develops protocols for gift capacity ratings and other ratings and scores.
2. Prepare high-level and well-written briefing reports for the use by the President, Vice President, Development staff and other administrators.
3. Develop plans and strategies for the management and expansion of the overall pool of prospects and donors through a broad range of proactive prospect identification projects.
4. Work with the Assistant Vice President of Development & Legacy Giving to ensure Development Officer portfolios are robust, contain strong, viable prospects, and are supported by a continual flow of newly identified and effectively rated prospective donors.

**OTHER DUTIES:**

- Assist with and participate in Office of Development and College Relations events and activities as requested (e.g., Homecoming, Family Weekend, Donor Recognition Events, ground-breakings and dedications, Monmouth Associates, Scots Day of Giving, Commencement, Golden Scots Reunion Celebration, etc.).
- Other duties and projects as assigned by the Vice President for Development and College Relations.

**SUPERVISION:**

Direct and supervise the work of the Records Coordinator and Gifts Coordinator, including completion of annual performance reviews.

**JOB REQUIREMENTS/QUALIFICATIONS (required unless otherwise noted):**

- A minimum of a bachelor's degree. Though relevant professional experience may be substituted.

(6/29/2022)

- Professional and/or volunteer experience in philanthropic fundraising, nonprofit organizations, public relations, advertising, marketing, or a related field is required.
- Excellent interpersonal, writing, and speaking skills.
- Must be highly organized, able to work independently, and have an ability to work under pressure to coordinate multiple requests and meet competing deadlines.
- Must be able to work collaboratively, supervise staff and interface with people at all levels. Ability to maintain good relationships with professional colleagues, donors, alumni, parents, faculty, staff, and students is required.
- Possess a warm, outgoing, energetic, positive demeanor.
- Demonstrated personal integrity and professional confidentiality.
- General knowledge of Windows applications and familiarity with relational databases and expert knowledge of database management practices requires.
- Superior analytical skill and the ability to locate and accurately interpret financial information.
- Familiarity with, and appreciation for, the role of the small liberal arts college is essential.

**GENERAL EXPECTATIONS OF POSITION:** Regular attendance on the job is an essential function of the position. Maintain regular and timely work hours as assigned by the position supervisor, and be prompt in arriving at the office every day; normal office hours are 8 a.m. to 5 p.m., Monday through Friday; regular schedule may be adjusted to reflect certain responsibilities. Work at least eight hours each day (not including breaks and lunch periods). Work additional time (weekends and evenings) as necessary to successfully carry out all position responsibilities and achieve program goals and results. Instructions and assignments are to be carried out in a manner that promotes and is consistent with the intrinsic goals of Monmouth College. All requirements are subject to change, with possible modifications made to reasonably accommodate individuals with disabilities.

**WORK RELATIONSHIPS:** Reports to the Vice President for Development and College Relations. Work with other members of the Development and College Relations Staff. Have daily contact with donors and associated persons and frequent contact with staff, faculty, students, other members of the campus community and public.

**ADDITIONS, AMENDMENTS, AND DELETIONS:** The whole or any portion of this Position Description may be added to, amended, or deleted at any time by the position supervisor, department head or President.

**DISTRIBUTION:** One (1) copy of this document will be provided to the employee, immediate supervisor, and department head. An additional copy will be maintained in the employee's personnel file.