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**DESCRIPTION, DUTIES & EXPECTATIONS OF POSITION**

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

1. Oversee operation of the Ellucian Colleague Communication Module, used in generating letters and other mail-merge documents. Coordinate and process mailings/solicitations lists for the Development Office. Review the logic of all complex requests (such as mailing lists or phoning lists to targeted constituent segments), seeking clarification as needed from the requestor. Participate in quality control checks before the data is released to requestors (this often will involve other staff members looking at the data as well) and coordinate such reviews.
2. 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. Assign ID numbers, make appropriate demographic changes and post each gift. 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.
3. Produce gift receipts and acknowledgement letters for all gifts. Notify the President's Office of donors who have made gifts of \$10,000 and above, conveying if gifts are restricted and if there are any other pertinent details the President should know regarding the gift.
4. Enter and manage all annual or multi-year pledges into the system and ensure that pledge acknowledgements and reminders are sent in a timely fashion. Routinely run outstanding pledge reports and keep Development Office staff updated regularly.
5. Process all credit card gifts, recurring gifts, and payroll deduction contributions, ensuring that annual tax receipts are produced and mailed in a timely manner to donors.

6. Document processes related to proposals, letters of commitment, planned giving, and campaign objectives.
7. Process routing forms for Letters of Commitment, endowed fund agreements and statements of intent, including filing in donor folders, scanning onto shared drive for business office, etc.; Verify that donors are properly entered into the McMichael Heritage Circle, the College's highest level of giving, and maintain the data records associated with membership; enter endowed prize & professorship recipients in appropriate Datatel screens.
8. Communicate appropriately to donors related to outstanding matching gift opportunities or matching gifts received.
9. Routinely generate and distribute reports for the Business Office; as well as reports to support the work of the Development Office, such as LYBUNT reports, SYBUNT reports, etc.
10. Keep "best practices" process workflows updated for the Development Office. These are continually changing as Ellucian Colleague releases new updates for the Colleague Advancement software.
11. Assist with the hiring, training and supervision of the work study students working in the alumni and development records area.
12. Assist the Director of Advancement Services with Datatel processes/testing/computer projects in which mass revisions need to be made, or new areas of data that need to be entered into the records such as advanced degrees, employment information, etc.
13. Other duties and projects as assigned by the Director of Advancement Services.

**GENERAL EXPECTATIONS OF POSITION:** Regular attendance on the job is an essential function of the position. Be prompt in arriving for work at the office every day; work hours for nonexempt support staff in this department are normally 8:00 a.m. to 4:30 p.m. with one hour off for lunch, Monday through Friday. Work hours are and will remain subject to change. Work at least 7.5 hours each scheduled workday (excludes lunch periods and approved leave). Must be willing and able to work occasional evenings and weekends, as assigned in advance by the supervisor. Conduct is expected to be professional and courteous, and must maintain a very high level of confidentiality. Instructions and assignments are to be carried out in a manner which promotes and is consistent with the intrinsic goals of Monmouth College.

**WORK RELATIONSHIPS:** Reports to the Director of Advancement Services; works directly with other Development Office staff and supervises student workers. Daily contact with students, staff, faculty, and public.

**EDUCATION, EXPERIENCE, AND CERTIFICATION:** High school diploma. Some college experience and coursework may be a plus. Successful experience in one or more areas involving customer services, analytical skills, and ability to interpret financial information may

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be useful.

**SKILLS, KNOWLEDGE, AND ABILITIES:** Must be able to work independently and as a team member. Excellent data entry, organizational, communication (written and verbal) and interpersonal skills. Proven ability to work courteously and effectively with a wide variety of individuals in a public, multi-tasked and service-oriented office (positive, upbeat manner). Proficiency in software applications or information systems (i.e., database, etc.) to fulfill related responsibilities listed above. All requirements are subject to change, with possible modifications made to reasonably accommodate individuals with disabilities.

**PHYSICAL REQUIREMENTS:** Work is normally performed in a typical office setting with some travel to main campus required, especially during alumni related events (Homecoming, Scots Day of Giving, Golden Scots, etc.),

- Sitting in a normal seated (stationary) position for extended period of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard.
- Communication skills using the spoken word, discerning and conveying (exchanging) information.
- Vision sufficient to see within normal parameters.
- Hearing sufficient to hear within normal range.
- Mobility sufficient to traverse campus.
- Occasionally required to move or transport (lift) items weighing up to 15 pounds.

All requirements are subject to change, with possible modifications made to reasonably accommodate individuals with disabilities.

**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 Director of Personnel or the position supervisor with the approval of the Director of Personnel.

**DISTRIBUTION:** One copy of this document will be provided to the employee and the position supervisor. An additional copy will be maintained in the employee's personnel file.