



Position: Director of Advancement Services

Classification: Administrative Staff (2,080 hours annually, full-time)

Reports To: Senior Director of Alumni Relations

Summary: The Director of Advancement Services is responsible for the organization and management of internal advancement activities, including donor records and acknowledgements, prospect research and database administration and financial reporting.

Responsibilities:

- Manage the development and alumni information system, working closely with Information Technology Services to maintain the standards of university-wide computing and to ensure the proper servicing and maintenance of equipment and software that serves institutional advancement.
- Function as liaison between Institutional Advancement and Informational Technology Services; attend regular monthly meetings and other administrative technology meetings as called.
- Assist with the initial migration to a new donor database system as a component of a campus-wide network; work with IT to implement ongoing enhancements and maintenance for the system.
- Ensure adherence to IRS gift policies, acknowledgement data requirements and CASE Campaign Reporting standards for gift acceptance and reporting.
- Provide gift reports and other information to the Business Office as needed.
- Prepare and submit all advancement industry surveys such as CASE and VSE.
- Maintain the CX gift processing manual; create and maintain an advancement services manual, including policies and procedures for the IA department.
- Provide donor and demographic reports as needed.
- Develop, with the Senior Director of Alumni Relations and VP for Institutional Advancement, annual and five-year strategic plans and annual operating goals and objectives.
- Conduct the training of IA staff members on database functions required for each specific position.
- Oversee and manage with the Manager of Donor Records the production of the annual Honor Roll of Donors.
- Oversee and assist in the production of endowed scholarship reports and maintenance of endowed scholarship records. Disseminate information to the Office of Stewardship and Donor Relations, the Business Office and Financial Aid Office as necessary.
- Supervise the Manager of Donor Records and be responsible for accurate maintenance of gift and alumni records. Serve as the primary back up for gift entry and donor records responsibilities.
- Work with the Controller's Office to share data and reports on fund accounting and serve as primary resource/contact for institutional auditors.
- Supervise the Manager of Research and Prospect Management. Prospect research provides appropriate and available background information on all potential leadership and

major gift prospects. Prospect management includes the general oversight of the university's major gift prospect pool including the prospect management tracking system (call reports, actions, prospect ratings, electronic and other screenings).

- Provide database reports for campaign, gifts, alumni, actions, events and other purposes as needed, for engagement and development purposes.
- Perform other duties as requested, delegated or assigned.

Qualifications:

Education and/or Experience:

- Bachelor's degree required
- Minimum of four years experience working with multiple priorities, preferably serving an education setting
- Advanced computer skills and training in database administration desirable
- Knowledge of Jenzabar CX, Cognos or other ad hoc reporting tools, and/or other advancement data products is preferred
- Knowledge of prospect research
- Knowledge of the basic accounting, IRS and CASE regulations for receiving gifts

Additional Knowledge, Skills and Abilities:

- Must be able to work well in advancement services functions and respond to colleagues across campus as customers for those services.
- Superior written, interpersonal and oral communication skills.
- High energy level, self-motivated and self-directed to design and complete complex projects.
- Must also have the skills and desire to: multi-task and meet deadlines; be a team player; work collaboratively; understand the principles and techniques relevant to alumni engagement and all elements of development.
- Knowledge of Microsoft Windows, Excel, Word and Outlook.
- Demonstration of integrity, positive attitude, diplomacy, tact, courtesy and a sense of humor.

Submit cover letter and resume to: hroffice@carrollu.edu

Posted: 12/9/2011

Human Resources
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