

**Senior Director, Gift and Donor Services
University of Rochester**

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The Senior Director, Gift and Donor Services is responsible for the management and oversight of two major areas of Advancement Services – gift and donor records, gift accounting and reporting. The Senior Director will serve as the primary liaison for Gift and Donor Services to the Advancement office, University and donors.

Reporting to the Associate Vice President for Advancement Services, the Senior Director will oversee department personnel consisting of approximately sixteen professional and support staff. The Senior Director will oversee a team of professionals to ensure the overall management of all strategic planning and procedures involving advancement gift processing, biographical and financial records maintenance, reconciliations, donor relations, and data oversight and quality control. The Senior Director will supervise the Director, Gift and Donor Records and Director, Gift Accounting and Reporting.

The Senior Director will develop and implement the strategic direction, both current and long range, for Advancement, and be a critical partner with the senior Advancement staff, provide tactical guidance in the review, communication and enforcement of University and Advancement policies.

The Senior Director will ensure that records are accurately maintained through the development and implementation of policies and procedure related to biographical data entry and gift processing that will monitor all data on a regular basis and accurately enter into the OASIS database; and that all areas of gift and donor records and gift compliance and reporting support the university's fundraising effort through strategic planning, participation in regular meetings, and goal setting with senior leadership.

Specific Responsibilities

With broad latitude for independent action, the Senior Director will:

(40%) Administration – Create and implement office-wide procedures and policies that will provide oversight for the efficient management and coordination of all development activities related to the gift and donor records, gift accounting and reporting and quality control programs.

- (15%) This includes standardized internal and external reporting, benchmarking with peer institutions and monitoring of best practices. Prepares current and long-range program plans and strategies, operational goals, and annual budgets to be used strategically in the fundraising efforts of the University. Create, monitor and administer all program budgets and expenditures related to the development, implementation and continuance of these core areas. Works with other University stakeholders (in Advancement as well as other areas) as lead on projects which impact Gift and Donor Services.
- (25%) Provides direct supervision to staff. Working closely with internal HR Advancement, will oversee, monitor, and manage administrative duties including recruiting, hiring, training, management, individual performance goals, performance reviews, personnel actions and all HR matters related to the program.

(35%) Gift and Donor Records, and Gift Accounting and Reporting Management – Works directly with the University General Counsel, finance office and with a team of professionals to develop procedures and strategies to ensure the overall management of gift processing, biographical records maintenance, donor relations, reconciliations are in alignment with University policies. In addition, through regular review, meetings and conversations, the Senior Director will oversee the process of creating accurate and timely financial reporting, records and gift agreements in accordance with University, IRS, CASE and other regulatory guidelines to support the overall advancement program at the University. The Senior Director will also implement all policy, regulatory, and CASE guidelines, where appropriate, across the Advancement organization.

Oversee and manage relationships with campus offices (particularly Student Financial Services, the Business Office, academic departments, Finance, Endowment Accounting and Budget office) to ensure that criteria established by donor intent and agreed upon by the University are met. The Senior Director will also interface with Stewardship and jointly develop a process for all gift agreement review and approval. Through participation in conferences, meetings and conversations, maintain professional connections and interactions with professional colleagues through organizations such as CASE. Create and oversee maintenance of policies and procedures for all gift and donor records, gift accounting and reporting and quality control functions.

Responsible for management of the overall accountability, reconciliation, integrity and trust of donors' financial contributions to the university. In this regard, the Senior Director provides oversight and management of donations handling policies, procedures, and guidelines approved by the University, and in keeping with the IRS, CASE and other regulatory guidelines.

(10%) Business Process and Policy Development – In conjunction with AIS, oversee the development and implementation of policies and procedures related to biographical data entry, gift processing and administration, and the confidentiality of constituent information. Through meetings, conversations and policy decisions, the Senior Director serves as the lead representative on all Gift and Donor Services-related Advancement projects, working in close collaboration with AIS and OASIS teams to enhance processes and information systems. In partnership with appropriate Advancement personnel, manages Advancement training on Gift and Donor Services policies and procedures.

(10%) Documentation and Certification – The Senior Director is responsible for oversight of all University of Rochester certifications (United Way, etc.). The Senior Director is responsible for the review and signing of all official IRS documentation. The Senior Director will lead and coordinate all affiliate relationships as well as with United Way and other external and third-parties as appropriate.

(5%) Other duties as assigned by the Associate Vice President.

Requirements

Bachelor's degree required. 8 or more years of experience with advancement operations or related experience preferred. Supervisory and management experience required. Preferred Master's Degree.

Skills

Ability to accurately apply judgment skills in all situations, especially related to management, donor issues and budgets. Outstanding communication skills, including direct interpersonal skills. Mature individual with knowledge of University systems and personnel. Extraordinary attention to detail and ability to deal with multiple, competing priorities with minimal supervision.

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