

Development Associate, Annual Giving Programs

PG 52

The Development Associate is responsible for working on strategy for direct marketing annual fund campaigns for assigned units and programs to achieve fiscal year dollar and donors goals. This role will interface extensively with other members of the Advancement office, campus leadership and donors and will report to the Senior Associate Director. The Development Associate will play a key role on the Annual Giving Programs (AGP) team, and in helping to achieve URMC annual fund fundraising and donor engagement goals, including:

- Executing over 75 waves annually of direct mail and email solicitations to more than 400,000 donors, friends, and prospects for URMC
- Improving direct mail return on investment rates through analysis and strategic execution of data files
- Increasing donor retention rates by 10% or more

Responsibilities

The Development Associate will:

30% - Project Management

- Closely plan and track overall data project deadlines and work independently within that framework to help meet them
- Prioritize and complete several datasets each week based on size, type of file, etc. and set deadlines in accordance with our drop dates.
- Make informed, strategic decisions regarding data. Determine appropriate ask amounts based on a donor's last gift, which is critical to the program's growth and dollars needed by university leadership.
- Create and assign appeal codes that help productive analysis on the back end, and understand what types of suppression files to run in each situation

20% - Data maintenance of Hospital/Clinical Annual Fund appeals:

- Manage data of current and new mailings; use judgement to ensure accuracy of names, addresses, etc. and negate the occurrence of duplicates
- Request appropriate suppression files and run against mailing data utilizing the V-lookup function in Excel
- Assign appeal codes and concatenate readable coding and barcodes in mailing files
- Work with Gift & Donor Services (GDS) or Advancement Services to ensure constituent records are updated in Oasis and/or MAS, and any major biographic errors (i.e. duplicate records) are repaired
- Send final files to unit directors to request their review and approval in a timely fashion – requires strong interpersonal skills and a solid understanding of direct mail pieces, audiences, and deadlines, as well as the ability to anticipate and answer questions within a tight timeline and manage colleagues to hit drop dates.

20% - Manage Med Center and GCH weekly stewardship process:

- Oversee Stewardship files and coordinate with GDS on any record modifications required. Send edited files to Med Center colleagues as appropriate.
- Determine which letter donors should receive in line with goals and programs needs
- Strategically identify larger annual fund gifts and communicate with appropriate staff connection. This is critical to major gift work and pipeline movement.
- Create a process to sort through gift backup from Children's Miracle Network (CMN) and follow up with appropriate AGP/GDS contact as needed. Manage gift export process from CMN

20% - Reporting and Analysis

- Help drive direct marketing strategy through reporting and analysis
- Maintain an up-to-date direct mail and email analysis database
- Lead on reporting for URM C AGP working closely with AGP Report Lead
- Run reports for quarterly unit updates, including wave analysis reports, upgrade/downgrade reports, Band reports, and LYBUNT reports. Format reports to be readable for AGP quarterly report meetings with unit contacts, Advancement leadership, and URM C leadership.
- Maintain and update the patient acquisition analysis data base

10% - Perform additional AGP project management duties as assigned:

- Strategically create all new appeal codes in Oasis and oversee departmental appeal code spreadsheet
- Create a process to ensure all final mailing files are properly formatted and loaded into Oasis in a timely manner
- Assist with direct mail project requests as needed
- Pull reports of hospital/clinical Annual Fund direct marketing gifts
- Participate in calendar year-end and fiscal year-end LYBUNT calling
- Proofread letters and online content to ensure the final product is error-free
- Draft some appeals and thank-you letters when requested by Senior Associate Director
- Manage an up-to-date, comprehensive URM C solicitation sample book
- Other projects upon request

Requirements

A Bachelor's degree, as well as 2-4 years of development experience, preferably with direct marketing and/or data management. General knowledge of higher education or hospital fundraising is also desired. Candidate must be well-organized, detail-oriented, possess excellent communication skills and follow-through with tasks, and have the ability to work within a complex organization. Ideally, the person should already be proficient in excel and would not need to be extensively trained on formulas, etc. Ability to learn quickly and work independently.