



Secretary IV Regional Advancement

Position Summary:

Requiring highly advanced secretarial skills and proficiency, the successful Secretary IV has primary responsibility for supporting an Executive or Senior Director and three to four Regional Directors as assigned. With minimal direction and considerable latitude for independent judgment, performs routine and non-routine office duties for the Office of Regional Advancement. This position reports to the Regional Support Coordinator.

Skills Required:

Advanced computer skills working in Microsoft Office in particular Word, Excel and e-mail and ability to navigate new database systems are required. OASIS database knowledge is a plus. This position necessitates good judgment, assertive problem-solving, a team player, strong customer relations and organizational skills. Candidate should be comfortable working with confidential donor information. The successful Secretary IV will be a mature individual with the ability to adjust to changing priorities and challenges in a team environment. Must be able to interact with Advancement and University leadership, staff, alumni and donors.

Specific Responsibilities:

- (45%) Support of assigned Executive and Regional Directors
- Work directly with Executive Director on data analysis; creating reports which will require knowledge in Excel.
 - Helps Regional Directors manage major gift prospects through effective use of donor tracking system and prompt follow-up on activity.
 - Uses OASIS and COGNOS efficiently to create lists, document visits, update entity records, research donors and generate reports.
 - Meet weekly with Directors and proactively work with them to achieve set individual goals.
 - Responsible for prompt entry of contact reports.
 - Updating of donor records and strategies.
 - Composes routine and non-routine correspondence providing information for donors and staff.
 - Draft correspondence for signature.
 - Processes gifts in a timely manner. Working with Gift and Donor Records as necessary.
 - Preparation of proposals and gift agreements.
 - Proof read and edit as needed.

(25%) Regional travel and activities

- Coordinates regional travel and donor activity for the Regional Directors
- Prepare travel itinerary; including transportation and lodging.
- Gather and prepare appropriate materials and event related activities as necessary.
- Makes arrangements for visiting key volunteers, major donors and major gift prospects.
- Works with Directors to orchestrate small dinner events in key cities.
- Promptly reconciles expenses on behalf of Regional Directors, processes travel expense reports and requests for payments with tight deadlines.

(10%) Calendar coordination and management

- With general guidance as to priorities, manages the time of the Executive or Senior Directors calendar.
- Coordinates competing demands on time, refers matters to be handled by others and manages access to Directors as appropriate.
- As needed, will provide back-up coverage in the absence of other support staff in the Office of Regional Advancement.
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(10%) General Office Duties

- Maintains office filing system.
- Interact with high level donors, senior executives and staff.
- Screen incoming telephone calls; clarify calls regarding urgency/importance.
- Assist with coverage of the reception desk as necessary.
- Triage mail per office rotation.

(5%) Ongoing learning and training.

- Will need to develop expertise with the prospect management system and other Advancement systems and protocols.
- Will also need to stay informed about University activities, events, fundraising priorities, etc.

(5%) Other duties assigned by the Regional Support Coordinator or Directors.

Basic Requirements:

Applicant should have a minimum of two years of post-high school education and at least three years of practical office experience. Demonstrated customer service experience, effective interpersonal communication skills, ability to prioritize multiple tasks, and experience planning and tracking details of multi-stage projects. Experience with current version of Microsoft Office applications. Database experience strongly preferred. A sense of humor and flexibility are essential.

Revised: 8/2019