

JOB DESCRIPTION

Job Title (30 character limit)	Associate Director, Donor Impact Reporting	Job Code	1209
Division/Function	Donor Engagement	Career Level/ Grade Level	056
Reports To	Senior Director, Donor Impact Reporting	FLSA	Exempt

GENERAL PURPOSE

The General Purpose provides a concise, high-level overview of the role, level, and scope of responsibility consisting of 3-4 sentences. It provides a basic understanding of the job and a concise summary of why the job exists and how it makes an impact.

With general direction from the Senior Director of Donor Impact Reporting, and significant latitude for independent judgment and initiative, the Associate Director of Donor Impact Reporting is responsible for managing improvements and expanding the scope of Advancement's stewardship efforts through enhanced reporting and personal connections between donors and students. All facets of the position require an understanding of donor sensitivity and the ability to interact well with all Donor Engagement constituencies.

JOB DUTIES AND RESPONSIBILITIES

This section contains a description of the 4-7 separate duties and responsibilities that make up the position. Assign each responsibility a percentage of time (increments of 5% and no one responsibility greater than 25%) to total 100%. Select an indicator (Y/N) for essential function and remote work. Job Duties should be listed in order of percentage of time, with highest percentage first. When estimating percentage of time, it can be considered that 10% of a week is 5 hours or 5 weeks in a year.

Responsibility	% of Time Spent (Must total 100%)	Essential* Function (Y/N)	Can Be Performed Remotely (Y/N)
<p><u>Customized Stewardship Reporting/Donor Interaction</u></p> <p>Provide oversight and management of the stewardship reporting process, including collection of departmental and student information.</p> <ul style="list-style-type: none"> Ensure that approximately 1,000 scholarship recipients receive detailed requests for information to be included on annual stewardship reports. <ul style="list-style-type: none"> Create student survey questions designed to encourage students to respond thoroughly. The donor-centric result of this innovation is that donors receive solid, meaningful information about their recipients. Organize and direct a staff group or freelance position which edits survey results for mechanics and content in Mythos. Customize individual stewardship reports for trustees and other top-level donors to reflect donor interests' specific to each fund. Meet or otherwise communicate with donors to address questions after annual reports are mailed. Personally deliver reports when appropriate. Manage scholarship awarding in collaboration with schools/unit. <ul style="list-style-type: none"> Ensure appropriate awarding by unit according to donor intent. Manage GEC scholarship fund and awarding status. 	25%	Y	Y

Responsibility	% of Time Spent (Must total 100%)	Essential* Function (Y/N)	Can Be Performed Remotely (Y/N)
<u>Customized Stewardship Reporting/Donor Interaction (continued)</u> <ul style="list-style-type: none"> Manage regular donor reports for endowed professorships. <ul style="list-style-type: none"> Coordinate with schools and faculty members to collect updates, including letters and/or reports, on professorships. Interview professors and write, when necessary, impact letters for their approval. Produce customized annual reports of financial and impact information to stewardees of professorships. 			
<u>Scholarship Stewardship</u> <p>Manage student and donor interactions to build positive and impactful relationships.</p> <ul style="list-style-type: none"> Manage special events and individual donor interaction between scholarship recipients and a select group of principal gift-level scholarship donors. This program includes one-on-one meetings with the donors, but also special opportunities to participate in academic and social events designed to build bonds between the students and with University staff to enhance relationships with these top donors. As appropriate, arrange and manage student/donor one-on-one meetings for lower-level donors, including contacting both donors and students to make arrangements, creating student and donor biographies, and making logistical arrangements. Responsible for proofing endowed scholarship information for publications. Responsible for disseminating endowed scholarship/fellowship information to Advancement leadership, department heads, and other Advancement colleagues, including fund counts. Student Event Participants/Testimonial Features <ul style="list-style-type: none"> Identify, interview, and recruit student participants for venues such as Meliora Weekend and Regional events. Manage or assist in managing communications and logistical details regarding student participants. 	25%	Y	Y
<u>Professorship Tracking</u> <p>Manage University's only complete record of all aspects of professorships.</p> <ul style="list-style-type: none"> Create and administer detailed professorship reports for Advancement leadership, department heads, and other University staff monthly, and when new funds are created, and in response to ad hoc requests. Assist the Senior Director of Donor Impact Reporting as Advancement liaison to schools for professorship information. Responsible for proofing professorship information for publications. 	15%	Y	Y
<u>Student Philanthropy Education Program</u> <ul style="list-style-type: none"> Plan and support Annual Celebration of Scholarships Event <ul style="list-style-type: none"> Assist in providing donor invitation list. 	15%	Y	N

Responsibility	% of Time Spent (Must total 100%)	Essential* Function (Y/N)	Can Be Performed Remotely (Y/N)
<u>Student Philanthropy Education Program (continued)</u> <ul style="list-style-type: none"> Manage student invitation process; designing/programming electronic invites; tracking responses; being creative to encourage declines to attend; and communicating event logistic information with students. Advise school directors and unit staff of special donor situations. Assist in recommending, interviewing, and rehearsing student program speaker and performer(s). Staff event to include but not limited to pairing donors with recipients. Manage post-event follow up process of photo delivery to students. Assist in other event follow-up, such as event mementos for participants and/or reports to those who could not attend. Develop and manage Student Scholarship Education Program <ul style="list-style-type: none"> Work with unit financial aid/student relations staff to develop and execute a program that educates students on the importance of endowed scholarships, particularly the impact of personal notes to donors 			
<u>General Stewardship</u> <ul style="list-style-type: none"> Act as liaison with Advancement, Admissions, and Financial Aid offices for questions of policy, procedure, fund histories, fund values, and other general inquiries about endowed funds. Assist with planning and staffing for Donor Engagement and Advancement events, such as Meliora Weekend. 	10%	Y	Y
<u>Other Responsibilities As Assigned</u> <ul style="list-style-type: none"> Assist as needed with executing stewardship plans for major and principal gift prospects. Complete research, benchmarking, and analysis of peer institutions and trade organizations as required to assist and maintain best practices within Donor Engagement. Support organizational needs and operations by participating in strategic planning and goal setting with Donor Engagement leadership. Participate in professional development activities such as conferences and webinars. Manage and direct other duties and special projects as requested by the Executive Director of Donor Engagement and the Senior Director of Donor Impact Reporting. 	10%	Y	Y

**Essential functions are those functions that the individual who holds or desires the position must be able to perform with or without a reasonable accommodation. A job function may be deemed essential based upon several factors such as whether: 1. the position exists for performance of the function; 2. the number of employees available who can perform the function and limitations on the ability to reassign it; or 3. the degree of skill or expertise required to perform the function.*

QUALIFICATIONS

This section lists the level of job knowledge (such as education, experience, knowledge, skills and abilities) necessary to do this job and whether it is required or preferred. Required qualifications are the minimum level of qualifications needed to perform this job. Preferred qualifications are "nice to have", but are not essential to the day-to-day functions of the job.

	Description	Required/Preferred
Minimum Education	Bachelor's degree	Required
Experience	5 or more years of development and/or donor relations experience, preferably in higher education or equivalent combination of education and experience	Required
Knowledge, Skills & Abilities	Must be customer service-focused team player with solid skills in Access, Excel, Word, and other Microsoft Office products. Highly organized with exceptional attention to detail. Excellent interpersonal and communication skills with the ability to work effectively with different generations, levels of experience and responsibility and a wide variety of backgrounds.	Required
Certification		

JOB SCOPE

Place an "X" next to the **ONE** statement that applies the majority of the time in each category.

Critical Thinking	
	Basic level of problem solving ability. Follows policies and procedures where facts are readily available.
X	Moderate level of problem solving ability. Gathers and interprets data to solve routine problems that require verification. Some independent judgement required.
	Independent level of problem solving ability. Resolves semi-complex problems that require independent judgement.
	High level of problem solving ability. Integrates and interprets data from diverse sources to find solutions to very complex problems.
Freedom to Act	
	Work is closely managed and reviewed for accuracy and adequacy. Follows specific, outlined and detailed instructions.
	Work is accomplished with moderate supervision. Follows established and detailed directions. Work is reviewed for accuracy and overall adequacy.
X	Work is accomplished with limited direction. Determines and develops approach to solutions. Work is evaluated upon completion to ensure objectives have been met.
	Work is accomplished without considerable direction. Exercises judgement in selecting methods, techniques, and evaluation criteria in obtaining results. Exerts significant latitude in determining objective of assignment. Takes calculated risks with consultation from an expert.
	Works with minimal direction toward predetermined long-range goals. Acts independently to determine methods and procedures on new or special assignments. Determines and pursues courses of action essential in obtaining desired results. Takes calculated risks.
Supervision of others (including hire/fire)	
	No supervisory responsibility
X	Non-supervisory leader (Example: team leader, coordinator, or mentor)
	Supervisory (two or more fulltime direct reports or equivalent)
Planning	
	Executes goals and objectives established by supervisor or manager.
X	Develops individual goals and sets individual daily priorities and tasks. Goals and objectives are monitored by supervisor or manager.
	Develops and executes goals and objectives for a department or functional group. Recommends and gives input to strategic initiatives.
	Creates business strategies for long-term strategic objectives. Monitors results of initiatives.
Consequence of Error	

	Failure to accomplish results can normally be overcome without significant effect on the organization.
	Failure to achieve results or erroneous judgements may require allocation of additional resources to correct and/or achieve goals.
X	Failure to obtain results or erroneous judgements or recommendations would normally have serious results and may require substantial expenditure of resources to correct and/or achieve goals.
	Erroneous decisions or recommendations would normally result in the inability to reach crucial organizational objectives and may have prolonged effect, as well as the expenditure of substantial resources.
	Erroneous decisions or recommendations would normally result in failure to reach goals crucial to significant organizational objectives and would profoundly affect the image of the organization.
Financial Responsibility (Please check all that apply)	
	Signing responsibility
	Manage pre-determined budget
	Independent judgement and responsibility to develop employer or departmental budget
	Responsible for revenue generating processes less than or equal to \$1M
	Responsible for revenue generating processes \$1M to \$5M
	Responsible for revenue generating processes greater than \$5M
	Independent judgement and authority to commit the employer in matters of significant financial impact

PHYSICAL/SENSORY REQUIREMENTS AND WORKING ENVIRONMENT		
<i>Indicate the physical/sensory requirement for each activity. Also indicate weight requirements where applicable</i>		
Activity	Rarely, Occasionally, Frequently, Continuously or N/A**	Weight***
Stationary Standing	O	
Sitting	F	
Walking	F	
Crawling	R	
Balancing	R	
Lifting/Carrying	O	20%
Pushing/Pulling	R	
Bending	O	
Squatting	O	
Kneeling	R	
Twisting/Turning	O	
Climb	R	
Stoop	R	
Overhead Reaching	O	
Typing/Keyboarding	F	
Driving (car/equipment)	O	
Critical Thinking/Organization	C	
Talking on Phone	F	
Talking in Person	F	
Hearing in Person	F	

****Key to frequency codes:**

R = Rarely (less than 0.5 hours per day)

O = Occasionally (0.6 - 2.5 hours per day)

F = Frequently (2.6 - 5.5 hours per day)

C = Continually (5.6 - 8.0 hours per day)

N/A = Not Applicable

***Weight: Up to 10lbs; Up to 20lbs; Up 35lbs; Up to 50lbs; Greater than 50lbs

Hazard Assessment

Please enter a "Y" next to any hazard that this job is subjected to in a **normal** workday

Hazard Present (Y/N)	Hazard Type	Hazard Description
N	Chemical	<p>Toxic: A chemical that exposes a person by absorption through the skin, inhalation, or through the blood stream that causes illness, disease, or death. The amount of chemical exposure is critical in determining hazardous effects. 1910.1000 for chemical hazard information.</p> <p>Flammable: A chemical that, when exposed to a heat ignition source, results in combustion. Typically, the lower a chemical's flash point and boiling point, the more flammable the chemical. Check MSDS for flammability information</p> <p>Corrosive: A chemical that, when it comes into contact with skin, metal, or other materials, damages the materials. Acids and bases are examples of corrosives.</p>
N	Explosion	<p>Chemical Reaction: Self-explanatory</p> <p>Over Pressurization: Sudden and violent release of a large amount of gas/energy due to a significant pressure difference such as rupture in a boiler or compressed gas cylinder.</p>
N	Electrical	<p>Shock/Short Circuit: Contact with exposed conductors or a device that is incorrectly or inadvertently grounded, such as when a metal ladder comes into contact with power lines. 60Hz alternating current (common house current) is very dangerous because it can stop the heart.</p> <p>Fire: Use of electrical power that results in electrical overheating or arcing to the point of combustion or ignition of flammables, or electrical component damage.</p> <p>Static/ESD: The moving or rubbing of wool, nylon, other synthetic fibers, and even flowing liquids can generate static electricity. This creates an excess or deficiency of electrons on the surface of material that discharges (spark) to the ground resulting in the ignition of flammables or damage to electronics or the body's nervous system.</p> <p>Loss of Power: Critical equipment failure as a result of loss of power.</p>
Y	Ergonomics	<p>Strain: Damage of tissue due to overexertion (sprains and strains) or repetitive motion.</p> <p>Human Error: A system design, procedure, or equipment that is error-provocative. (A switch goes up to turn something off).</p>
N	Excavation (Collapse)	Soil collapse in a trench or excavation as a result of improper or inadequate shoring. Soil type is critical in determining the hazard likelihood.
Y	Fall (Slip, Trip)	Conditions that result in falls (impacts) from height or traditional walking surfaces (such as slippery floors, poor housekeeping, uneven walking surfaces, exposed ledges, etc.)
N	Fire/Heat	Temperatures that can cause burns to the skin or damage to other organs. Fires require heat source, fuel, and oxygen
N	Mechanical/Vibration (Chaffing/Fatigue)	Vibration that can cause damage to nerve endings or material fatigue that results in a safety-critical failure. (Examples are abraded slings and ropes, weakened hoses and belts.)
N	Mechanical Failure	Self-explanatory; typically occurs when devices exceed designed capacity or are inadequately maintained.
N	Mechanical	Skin, muscle, or body part exposed to crushing, caught-between, cutting, tearing, shearing items or equipment.
N	Noise	Noise levels (>85 dBA 8 hr TWA) that result in hearing damage or inability to communicate safety-critical information
N	Radiation	<p>Ionizing: Alpha, Beta, Gamma, neutral particles, and X-rays that cause injury (tissue damage) by ionization of cellular components.</p> <p>Non-ionizing: Ultraviolet, visible light, infrared, and microwaves that cause injury to tissue by thermal or photochemical means.</p>
N	Struck by (Mass Acceleration)	Accelerated mass that strikes the body causing injury or death. (Examples are falling objects and projectiles.)
N	Struck Against	Injury to a body part as a result of coming into contact of a surface in which action was initiated by the person. (An example is when a screwdriver slips.)



N	Temperature Extreme (Heat/Cold)	Temperatures that result in heat stress, exhaustion, or metabolic slow down such as hypothermia.
N	Visibility	Lack of lighting or obstructed vision that results in an error or other hazard.
N	Weather	Phenomena (Snow/Rain/ Wind/Ice) Self-explanatory.

Approvals

Signature

Date

HR Business Partner:

Compensation Analyst:

Approver:

