

JOB DESCRIPTION

Job Title (30 character limit)	Sr Dir, Gift and Donor Services	Job Code	1250
Division/Function	100006	Career Level/ Grade Level	57
Reports To (Title)	Associate Vice President, Support Services	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.

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, and 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.

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)
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. 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	25	Y	Y

Responsibility	% of Time Spent (Must total 100%)	Essential* Function (Y/N)	Can Be Performed Remotely (Y/N)
program.			
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.	15	Y	Y
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.	25	Y	Y

Responsibility	% of Time Spent (Must total 100%)	Essential* Function (Y/N)	Can Be Performed Remotely (Y/N)
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.	5	Y	Y
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.	5		
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.			
Other duties as assigned	5	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 Master's	Required Preferred
Experience	8 or more years of experience with advancement operations or related experience preferred. Supervisory and management experience required.	Preferred
Knowledge, Skills & Abilities		
Certification	CPA beneficial to scope of responsibility.	

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.
	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.
x	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.
	Work is accomplished with limited direction. Determines and develops approach to solutions. Work is evaluated upon completion to ensure objectives have been met.
x	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
	Non-supervisory leader (Example: team leader, coordinator, or mentor)
x	Supervisory (two or more fulltime direct reports or equivalent)
Planning	
	Executes goals and objectives established by supervisor or manager.
	Develops individual goals and sets individual daily priorities and tasks. Goals and objectives are monitored by supervisor or manager.
x	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.

	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.
x	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 <i>(Please check all that apply)</i>	
	Signing responsibility
x	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	F	
Sitting	C	
Walking	O	
Crawling	N	
Balancing	N	
Lifting/Carrying	R	Up to 25 lbs
Pushing/Pulling	R	
Bending	R	
Squatting	R	
Kneeling	N	
Twisting/Turning	N	
Climb	N	
Stoop	N	
Overhead Reaching	R	
Typing/Keyboarding	C	
Driving (car/equipment)	R	
Critical Thinking/Organization	F	
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)

C = Continually (5.6 - 8.0 hours per day)
N/A = Not Applicable

F = Frequently (2.6 - 5.5 hours per day)

***Weight: Up to 10lbs; Up to 20lbs; Up to 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.
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Approvals

HR Business Partner:

Compensation Analyst:

Approver:

Signature

Date
