

## PERFORMANCE PROGRAM

Name: \_\_\_\_\_ Supervisor: \_\_\_\_\_

College Title: Associate Director of Annual Giving State Title/SL: \_\_\_\_\_

Department: External Affairs Date in Title: \_\_\_\_\_ Percent Effort: 100%

Permanency Date: \_\_\_\_\_

Performance Program Period From: \_\_\_\_\_ To: \_\_\_\_\_

### **Section 1 - Duties & Responsibilities:** (Summarize the primary duties and responsibilities of the position.)

The **Associate Director of Annual Giving** handles the everyday “nuts and bolts” aspects of the majority of components of the Annual Giving program (see below), including the responsibility of developing and processing major direct mail solicitations. They must have a strong understanding of the entire annual giving program, how each component overlaps and fits with the other components and timing of solicitations. They must have strong writing skills and creative ideas for developing new and timely solicitation pieces and to add “life” to old programs that are essential, yet need a new “look”.

This involves creating annual fund themes, writing all annual fund letters, including direct mail solicitation, acknowledgement letters, Phonathon scripts, and any other correspondence as needed. The Associate must be able to directly pull data from the database program (currently Datatel), collect, manipulate and analyze the data for program effectiveness using various computer programs including Excel. In addition to major direct mail and Phonathon components, the Associate will continue program development and production for all aspects of monthly direct mail stewardship (first time donors, matching gifts and in honor or in memory of letters), updating the website and assisting the Director as needed.

Time permitting, the Associate is encouraged to develop a prospect list and visit with potential donors, knowing their main focus is on the annual fund programs. It is essential that the Associate Director take ownership of the annual fund program components and be as independent and self-sufficient as possible. They must have the ability to develop and monitor program components with minimal supervision or oversight from the Director.

See attached listing of specific duties and responsibilities of the Associate Director of Annual Giving.

#### **ANNUAL FUND COMPONENTS Associate Director Direct Responsibility**

- 1. Direct Mail, Email and other cyber Solicitations and Communications**
- 2. Direct Mail Stewardship, including all Acknowledgement letters**
- 3. Phonathon and Pledge Reminders**
- 4. Publication Materials (inserts, brochures, stationery, etc.)**
- 5. Annual Fund Website Pages, including on-line giving**

### **Section 2 - Objectives:** (Describe in detail the specific short-term and long-term objectives to be achieved by the employee during the period of this program.)

Annually increase by 5% over the previous year’s fundraising totals for the Annual Fund:

- The number of donors to the Annual Fund and the College Foundation from all sources, including acquiring first-time annual fund donors and retaining previous annual fund donors.

- The number of leadership donors to the Annual Fund (\$500).
- The amount of total dollars raised for the Annual Fund from all sources.

Implement creative solicitation projects involving direct mail, phonathon and employee solicitations, among other things.

**Section 3 – Supervisory Relationships:** (List employee’s immediate supervisor and those supervised by the employee.)

Associate Director reports directly to the Director of Annual Giving and does not have any employees reporting to them.

**Section 4 – Functional Relationships:** (List offices/individuals that are functionally related to the employee’s responsibilities and describe the relationships and connections with each.)

Must be able to interact with internal and external audiences including, but not limited to:

**External Relations Staff, including, but not limited to:**

**Director of Prospect Research and Advancement Services – Vicki Schaake**

Accurately request necessary data and segmentation of information needed for solicitation and analysis of annual giving programs, including the ability to learn to query data directly from the database independently. In addition, must understand how gifts are processed and interpret the information available on Datatel.

**Coordinator of Alumni Services – David White**

Regarding web page updates and department technology

**Director of Alumni and Student Relations – Maureen Winney**

Regarding timing of alumni programs and publications for blending with annual fund programs and publications.

**Office of College Relations**

Work with College Relations to design all annual fund pieces, including, but not limited to brochures, stationery, forms and other designed materials as needed.

**Printing and Mail Departments**

Work with these departments for accuracy and timeliness of production and mailing of materials needed to execute the annual giving programs.

**Alumni and Students**

To gather information for use in annual giving programs, cultivate, and qualify alumni.

**Section 5 – Secondary Sources:** (Identify agencies, offices, or individuals that will be involved with the performance of the professional employee and may affect the employee’s ability to achieve the stated objectives. These secondary sources may be consulted as part of the evaluation process.)

College Centers and Units

Internal offices as needed not previously mentioned

**Section 6 – Criteria for Evaluation:** (Employees are evaluated on areas such as effectiveness in performance, mastery of specialization, professional ability, effectiveness in University service and continuing growth. In addition, list the areas specific to the employee’s position which will be used as criteria for evaluation.)

Achieving growth in the number of donors and dollars raised annually with regard to above stated goals through the annual fund components listed above.

Reevaluation and adaptation of programs to fit the changing needs of the institution and its alumni.

Introduction of new ideas and approaches to achieve above stated goals.

**Section 7 - Acknowledgement:**

Employee: \_\_\_\_\_ Date:

Comments:

Supervisor: \_\_\_\_\_ Date:

Comments:

Dean/Director: \_\_\_\_\_ Date:

Comments:

Vice President: \_\_\_\_\_ Date:

Comments:

**DISTRIBUTION:** Office of Human Resources (original)  
Employee  
Immediate Supervisor  
Area Vice President

## **Specific Duties and Responsibilities of the Associate Director of Annual Giving**

**The development, oversight and production of major components of the Annual Giving Program from inception to completion.**

### **Direct Mail and E-Mail Appeals**

- Develop, write, and produce all direct mail and e-mail appeals including
  - Annual fund theme
  - Writing and content of letters/e-mails
  - Segmentation
  - Corresponding stationery and brochures and/or inserts
- Query/pull data from Datatel
  - Direct mail pieces must be data driven
    - To produce specific direct mail segmentation based on factors such as
      - Grad year
      - Center affiliation
      - Mentor
      - Number of gifts in one year and over time
      - Campaign codes gifts are received under
      - Personal involvement/affiliation with institution
      - Age
      - Major/degree
- Work with internal departments to meet deadlines for completion of direct mail projects
  - College Relations (OCR) – the development and production of stationery, brochures/inserts, etc.
  - Print Shop – with OCR oversee production of materials for mailing
  - Mail Room – supply mail room with data and/or files needed ( merged documents for mailing) and determine mailing requirements

### **Phonathon Program**

- Primary liaison between the College and telemarketing vendor
- Development of segmentation, calling periods and theme of calling sessions
- Write/revise and implement as needed
  - Calling scripts
  - Follow-up e-mails
  - Acknowledgements
  - Pledge Reminders
    - Set up pledge reminder program for maximum pledge fulfillment
- Monitor, assess and ensure the quality of calls placed by the vendor to alumni during the phonathon sessions
- Provide vendor with stationery, brochures/inserts as needed
- Update Phonathon results daily
- Follow up on all alumni comments received

### **Donor Stewardship**

- Writing and production of monthly letters needed for various donor stewardship annual fund components
  - All donor acknowledgements of gifts less than \$500

- Signing of letters to all donors with a gift less than \$100
- Matching Gifts letters
  - Reminding donor they work for a matching gift company and encouraged to pursue a match through their HR dept.
- First time donor letters (under the President's signature)
- In Honor of and In Memory of letters
- Loyalty Leader members
  - Donors who have reached consecutive giving milestones of three, five, 10, 15 or 20+ years

### **Oversight of Web Pages**

- Writing content of all annual fund /foundation web pages
- Timely updating of information on web pages