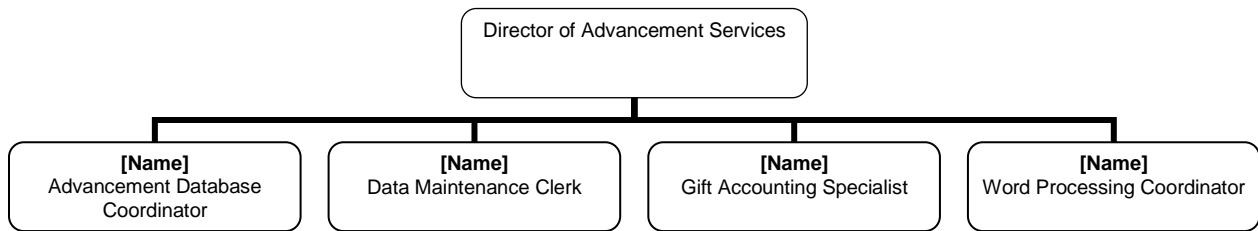


# ADVANCEMENT SERVICES



## MAIN DEPARTMENTAL FUNCTIONS

*Support of all Advancement Office programs through:*

- Administration and configuration of Advancement's data system, The Raiser's Edge (RE),
- Data system/software support and training,
- Maintenance of all records and data on Advancement data system,
- Address and telephone research,
- Processing all gifts and pledges received by the college,
- Ensuring adherence to CASE standards, IRS regulations and FASB standards for gift processing and receipting, as well as in all fundraising reports,
- Report generation using system and software reporting tools (using RE, MS Access, MS Excel, Crystal Reports, and MapPoint),
- Word processing as required for program support,
- Working in association with Tech Services to maintain all areas of Advancement data system and computer equipment and printers, and
- Advancement office management (purchasing, equipment maintenance, etc.).

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## POSITIONS & PRIMARY RESPONSIBILITIES

### Director

- Oversight of all departmental functions and Advancement Office management,
- Oversight of all reports produced by department using available reporting tools,
- Preparation of reports (primarily all regular fundraising and campaign gift reports),
- Preparation and submission of all Advancement industry surveys,
- Oversight of department budget,
- Development of annual Advancement Services Plan of Operation and strategic planning, staff performance line objectives, and providing annual staff evaluations,
- Primary liaison between Advancement Office and Tech Services regarding management of data system, Advancement Office computer equipment and printers, and network issues, and
- Data system and basic software support, including usage and training (using RE, MS Word, Access, Excel, Crystal Reports, and PowerPoint).

### **Advancement Database Coordinator – [Name]**

- Configuration and administration of Advancement data system,
- Provide regular data quality checks and system analysis of RE,
- Preparation of reports (primarily program support) using available reporting tools,
- Data system and basic software support, including usage and training,
- Hire, schedule and provide oversight of all regular, floating and summer student workers for Advancement Office,
- Monthly Advancement Office and Advancement Services budget summaries and detail verification,
- Reconciliation of department purchasing card,
- Assist in gift entry (back-up), and
- Data system and basic software support, including usage and training (using RE, MS Word, Access, Excel, Crystal Reports, MapPoint, and scanner).

### **Data Maintenance Clerk – [Name]**

- Provide data processing and maintenance on RE (address and bio changes, corrections to constituent records, address research, coding, etc.)
- Training and oversight of student workers handling data entry projects,
- Address and telephone research,
- Maintenance of donor/prospect hard files.
- Purchase of office supplies and equipment,
- General office administration and equipment maintenance,
- Advancement Office telephone, calendaring and hospitality,
- Assist in word processing (back-up), and
- Use of RE, MS Word, Excel, and Access.

### **Gift Accounting Specialist – [Name]**

- Gift and pledge entry on RE – including planned gifts, gifts-in-kind, etc.,
- Stock transfers (in conjunction with assistant to the CFO),
- Preparation of receipts and gift receipt letters,
- Daily gift reports,
- Making deposits and providing system gift feed to accounting,
- Handling matching gift process,
- Campaign pledge reminders,
- Maintenance of donor giving history, and
- Use of RE, MS Word, Excel, and Access.

### **Word Processing Coordinator – [Name]**

- Provide word processing as required for program support (including bulk mailings),
- Basic graphic design for invitations, brochures, etc.,
- Daily Luckey run,
- In Honor and In Memory gift notification process,
- Schedule on-call student workers and supervise for general Advancement mailings,
- Maintain Advancement Office and Advancement Services hard files,
- Prepare trustee agendas and report packets,
- Assist with gift receipts and thank-you letters (back-up),
- Assist in RE data maintenance (back-up), and
- Use of RE, MS Word, Publisher, Excel, and Access, and scanner.