

POSITION VACANCY

Senior Director of Advancement Operations

Summary of Position:

The Senior Director of Advancement Operations is a key member of the leadership team in the Institutional Advancement (IA) Division. Reporting to the Vice President for Institutional Advancement (VPIA,) the Senior Director (SDAO) leads the areas of Advancement Services, Prospect Development and Donor Relations. The SDAO serves a leadership role in minimizing risk by understanding and applying all regulations and guidelines governing fundraising, gift processing and gift accounting and reporting (IRS, CASE, FASB/GASB, etc.), by accurately recording and reporting fundraising information, and by securely managing sensitive data. The SDAO works closely with the Business Office to ensure clarity and translation between accounting standards, donor intent, and the language of philanthropy. In partnership with the VPIA and other IA team members, the SDAO maintains and updates policies and procedures for Institutional Advancement and works cooperatively with campus partners to ensure adherence to gift policies. Daily primary focus for this position is prospect management and research. This position is responsible for the systematic identification, determination, analysis, and maintenance of relevant information on major gift prospects. The incumbent analyzes, interprets, and formats biographical, professional, and financial information needed to facilitate the solicitation of private funds from individual and corporate donors by the College's advancement staff. This research and analysis serve as the foundation of our fundraising campaigns and directly contributes to the division's success. The SDAO consults directly with Development Officers, the Senior Director of Development, and the Vice President to identify and qualify prospects who have the propensity and capacity to support current Westminster College initiatives.

Duties/Responsibilities:

1. The SDAO supervises the functions and team members in Advancement Operations, which includes Advancement Services (database management, gift processing and receipting, and biographical records) donor relations, and prospect management and research. This includes hiring, training, and developing employees, including but not limited to holding team and individual meetings, as well as conducting performance evaluations.
2. Ensures that the Advancement Services team maintains and follows written procedures on IA policies including the college's gift acceptance policies (following CASE/FASB/IRS policies); Database Training; Stewardship Policies and Procedures; Reports generated by IA for various stakeholders; and Prospect Management Procedures. This also includes being responsible for IA Information compliance, setting policies on database integrity, use, and information storage after consultation with colleagues, and adhering to information and security regulations.
3. Prospect Pipeline Management - Implement a strategic plan for the management and expansion of the overall pool of prospective donors through a broad range of proactive prospect identification and analysis efforts. Work closely with fundraising teams to ensure portfolios are robust, contain strong, viable prospects, and are supported by a continual flow of newly identified and appropriately rated prospective donors. Serve as a partner to front-line fundraisers in the creation of donor strategy and portfolio management. Develop and track gift/scholarship/naming/sponsorship agreements. Lead monthly "Moves Meeting" with the development officers and VPIA.
4. Prospect Research - Conduct proactive and reactive research to identify and evaluate new and existing prospects, with a focus on providing easy-to-digest information on an expanding pool of potential donors. Complete in-depth research on individuals with complex backgrounds and resources and execute rapid research on a wide range of people for fundraising initiatives or in geographic regions. Analyze and synthesize accumulated information to assess financial capacity, philanthropic tendencies, giving propensity and linkages to the College. Evaluate, interpret, update, and format biographical, professional, and financial information into concise report formats for various fundraising constituencies, including development officers, vice presidents, college president, and board of trustee members. Organize and maintain prospect

records within the Raiser's Edge database. Perform annual data screen/appends/models with third-party vendors to secure wealth indicators, improve data integrity and develop the prospect portfolio strategy with the fundraising team. Lastly, provide brief guest summaries for events and profiles for Board of Trustee nominations and renewals.

5. Special Fundraising Project Management - Provide support for current initiatives such as, but not limited to: annual LYBUNT outreach tracking; fundraising strategies for capital project(s) and tying the fundraising effort to the donor relations team.

6. Planned Giving Support & Open Estate Management - In conjunction with the VP/IA, follow up on open estates to ensure donor intent and provide tracking metrics of these open estates for pipeline/cashflow predictions. Work with estate executors to close necessary documentation on open estates.

7. Maintain knowledge of current giving trends including but not limited to bitcoin, stock, matching corporate gifts, gift annuities, and bequests.

8. Serves as a member of the IA team with assistance at donor and alumni events, which may fall on evenings or weekends.

Supervisor: Vice President for Institutional Advancement. The incumbent will supervise the Director of Advancement Services and oversee the prioritization of tasks related to gift processing, data management, and donor relations.

Education and Experience Required: Bachelor's Degree required with master's preferred, 5 years of progressive experience within an advancement/fundraising setting.

Other Desired Skills/Abilities:

Practical knowledge of annual giving operations and an understanding of what it takes to expand donor participation. Practical knowledge of major, planned, and principal giving operations and an understanding of what it takes to dramatically increase support to those areas. Practical knowledge of alumni engagement operations and an understanding of data-driven methodologies to increase and improve alumni engagement opportunities that ultimately result in ongoing philanthropic support for the College.

Proven ability to effectively communicate with both system-based colleagues and forward-facing fundraising colleagues is essential as the role includes high visibility with all College constituencies. Commitment to treating colleagues kindly with respect and dignity. Stature, credibility, and capacity to build and sustain effective relationships with colleagues at all levels and with partners elsewhere at the College while advocating for and securing resources in support of Institutional Advancement's agenda. Ability to embrace change and shifting priorities based on institutional needs and the national higher education environment. Commitment to excellence in all aspects of individual, collective, and organizational performance. Deep and abiding commitment to customer service. Contributes to an organization that places a high value on trust and teamwork; emphasizes cooperation and collegiality to foster an exceptionally positive and productive work environment. Maintains the highest standards of fiscal, ethical, and professional conduct. Contributes to building a culture of philanthropy at Westminster by taking responsibility for other special tasks as requested. Experience with electronic database management. Demonstrated investigative instinct. Ability to work both independently and as part of a team. Must possess excellent written and oral communication skills, and possess a high attention to detail and organization. Strong project management and problem-solving skills are required. Must be able to maintain confidentiality.

Technology Experience/Skills: Knowledge of and experience with: advancement research resources, including searching techniques, Microsoft Office Suite, and advancement-specific platforms used by the institution. Experience with Raiser's Edge/NXT is preferred.

Interested individuals should send a cover letter, resume, and the names and contact information for three work related references to iaapply@westminster.edu by no later than **March 21, 2025**.
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