

Appendix G: Advancement Information Systems Reference Guide

UI Functional Job Roles

Confidential I: Business Manager

Business Operations

UI employees who do not report to advancement but perform the related functions related of gift/fund management and/or gift acknowledgement.

Confidential II: Advancement Support

Human Resources/Professional Development

Responsible for employment-related services within the advancement community, including any or all of the following: training and professional development, employment processing and status changes, payroll processing, maintaining personnel records, and conducting various reporting functions related to employment.

Support Staff for Advancement/Development

Responsible for providing support for development or advancement functions. Support professionals may be assigned full-time or part-time to advancement. Responsibilities often include trip planning, report generation, and form correspondence. Support professionals may be granted higher levels of access as needed to accomplish tasks for designated persons or units. For example, an advancement officer's assistant may be granted access to development activities information (Confidential III, see below) in order to update and/or print call reports on behalf of his or her supervisor.

Student Worker for Advancement/Development

Responsible for accomplishing miscellaneous tasks for development or advancement functions. Responsibilities may vary widely among positions. Student Workers may be granted higher levels of access as needed to accomplish tasks for designated persons or units. For example, a student employee may be granted access to full contact information in order to update mailing addresses, phone numbers, email addresses, and the like (Confidential II, see below) on behalf of a unit.

Confidential III: Advancement Constituent Relationship Management (CRM)

Events

Plans and executes advancement events, including events related to fundraising, alumni recognition, investitures, advancement retreats, and the like.

Marketing/Communications

Responsible for any combination of marketing/communications activities within the advancement community, including planning, reporting, writing, editing and the production of print, web, electronic/digital communications and online communities.

Confidential IV: Advancement Officer

Academic Executive

The Academic Executive group includes academic leadership among the universities and the units whose duties include advancement work, including the University President, university Chancellors and Vice Presidents, Vice Chancellors, Deans, Directors, and Department Heads. Persons in this group may request lower levels of access.

Advancement Executive

Advancement Executives serve in senior leadership roles within the advancement community at the Universities, UIAA, or UIF. Persons in this role include the Alumni Association and the Foundation Presidents and Vice Presidents, Vice Chancellors, and Associate/Assistant Vice Chancellors. Primary responsibility is to set strategic direction for advancement programs, manage staffing and/or budgeting for university or URO, and cultivate board relationships.

Chief Advancement Officer/Director of Advancement

Responsible for planning and implementing a comprehensive advancement strategy for a college/unit, typically including development, alumni relations, special events and communications functions. Serves as primary liaison with university administrators and the college/unit's dean or director regarding advancement. Assists academic department heads and faculty in managing advancement initiatives.

Maintains a significant travel schedule throughout the U.S. meeting with alumni, corporations and foundations to secure private support. Supervises advancement staff.

Major/Principal Gifts/Gift Planning

Primary responsibility is to meet with alumni and friends of the university to identify, cultivate, solicit and steward gifts of \$25,000 or more. Employees are considered Major Gift Officers if they are assigned visit goals by their Unit Chief Advancement Officer. Principal Gift Officers focus on gifts of \$5 million or more. Gift Planning Advisors work with major and principal gifts officers to provide information and advice regarding deferred giving instruments (annuities, trusts, bequests, etc.) and prepare fund agreements. May also manage a portfolio of donors and prospects.

Corporate/Foundation Relations

Primarily responsible for working closely with colleges, units and senior administrators to expand and steward relationships with foundations and/or corporations. Researches and develops presentations and proposals to fund university initiatives. Travels throughout the U.S., and sometimes internationally, to meet with corporate or foundation representatives. Secondary duties may include Major Gift work with individual donor prospects.

Annual Giving

Primary responsibility is to work with direct mail and telemarketing programs to secure gifts of \$24,999 or less from alumni and friends. Additional responsibilities may include identifying and/or personally engaging in relationships with donor prospects for Leadership Annual Giving.

Alumni Relations

Primary responsibility is to build life-long, mutually supportive relationships between the institution and its alumni. Typical responsibilities include event planning, volunteer recruitment and coordination, administration of awards and recognition programs, data management, strategic communications, advocacy, maintenance of institutional history and traditions, and outreach to current students as future alumni.

Donor Research and Analysis

Primarily responsible for developing prospect and donor lists and creating ad hoc reports for use in various University units.

Advancement Administrator

Responsible for management and/or oversight of non-major gift fundraising activities. Duties typically include general administration, alumni relation, events, communication, stewardship, and/or annual giving.

Stewardship/Donor Relations

Primary responsibilities include coordinating gift acknowledgements and donor recognition, drafting donor correspondence, tracking fund agreements, and serving as liaison with Board members and volunteers.

Confidential V: Specialized UIF/UIAA Roles

Donor Research and Analysis

Responsible for identifying and profiling new sources of private support for the university's fundraising efforts by using the Foundation, University and community research libraries, archival materials and online databases to provide biographical and financial research of individuals and organizations; prospect analysis; tracking major donor prospects; associating revenue with opportunities; and helping gift officers optimize their portfolios.

Gift Administration

Responsible for direction and support for the acceptance and processing of gifts in support of University unit under established UIF policies and procedures. Includes the gift processing and cash receipts functions.

Trust Services

Maintains records and accounts of funds held in trust by the Foundation. Compiles tax returns and other associated materials.

Information Technology Services

Responsible for developing and maintaining Advancement information systems, including design and development of Blackbaud, UIF Online, OnBase and other software. Provides training and support to system users. Individuals in this role receive system- and table-specific access based on their job duties.