

Carleton College Non-Exempt Position Description

Job Title: Development Coordinator
Grade: 9
Reports To (Title): Director of Milestone Reunions, Director of Planned Giving
Department: Development Office
Division: External Relations
Revision Date: November, 2021

Position Overview:

The Development Coordinator supports the administrative and programmatic work of the Milestone Reunions and Planned Giving Offices to facilitate gifts from alumni, parents and other friends that contribute to the financial goals of the College. The position requires a high level of accuracy, exceptional customer service to both external and internal audiences, ability to produce work under tight deadlines, ability to solve problems independently, ability to collaborate with staff in other departments, and ability to maintain confidentiality and interact professionally with a wide range of people.

Essential Job Functions/Responsibilities:

Milestone Reunions:

Support 50th reunion donors and volunteers:

- Serve as the first point of contact for the Milestone Reunions office.
- Respond appropriately to donor inquiries and serve as a liaison with Carleton's planned giving office to facilitate planned gifts from 25th and 50th reunion alumni.
- Troubleshoot and provide training for volunteers in the Volunteer Portal.
- Organize and participate in virtual meetings and conference calls with volunteers. Support video and audio technology needs to facilitate virtual and hybrid meetings.
- Run reports, compile statistics, and manipulate data for staff and volunteers as requested.
- Work with 50th Reunion outreach, program, and gift committees on projects and communications.
- Receive project direction from the Director of Milestone Reunions in support of reunion committees. Specifically,
 - Input, update, and maintain volunteer records.
 - Produce segmented class communications.
 - Organize and host class virtual events.
 - Collaborate with volunteers, student workers, and staff to produce short publicity videos.
 - Create content and provide technical support for 25th and 50th Reunion websites.
- Help coordinate and oversee the work of student office staff.
- Provide general office support for the Milestone Reunions Office. Reconcile purchasing card statements, appropriately respond to alumni questions and concerns received through the office's email and phone lines, and draft routine correspondence and gift acknowledgments.
- Support 50th reunion meetings held both on campus and off campus in designated areas of the country, as well as the June Reunion. This includes:
 - Assist with volunteer training and orientation prior to and during committee meetings.
 - Process volunteer expenses for committee members, monitor expenditures and prepare spreadsheets to chart committee expenses.
 - Some event planning, requiring discretion, independent decision making, and good judgment regarding when to consult and communicate with others. Attendance at evening and weekend events occasionally required.
 - During Reunion weekend, provide volunteer and event support and attend Heywood Luncheon and other 50th reunion events.

Planned Giving:

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- Assist with planned gift proposals, including running reports from alumni database, retrieving historical information about donors, assembling materials for donors, including creating proposals in PG Calc (in-service training provided).
- Assist the Planned Gift Administrator with processing new life income gifts, maintaining and updating donor information in alumni database and with TIAA Kaspick, and filing documentation.
- Assist the Director of Planned Giving with written and electronic marketing.
- Draft routine correspondence, type and proofread follow-up letters and materials, process expense reports, and reconcile Visa statements.
- Respond to phone inquiries and independently answer or work with others to answer giving questions from key donors and constituents.
- Support staff travel including coordinating travel arrangements, creating and distributing pre-trip memos and itineraries, and responding to itinerary changes.

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties to meet the ongoing needs of the organization.

Describe Supervision Received and Exercised:

The person in this position must be able to work with minimal supervision in prioritizing daily tasks, adjusting those priorities as situations change, following through on the director's needs for documents or information, responding to donors' and volunteer inquiries, forwarding gifts (especially checks, stock certificates, and documentation of estate provisions) for processing and acknowledgment, tracking the documentation for planned gifts over time and to completion, and relaying information from donors and volunteers to staff. This position assists in providing direction for student office assistants.

Required Qualifications:

- Associate degree and two years of directly related work experience.
OR
- High school diploma and five years of directly related experience.
- Three to five years of directly related office experience in a fast-paced environment.
- Ability to initiate, organize, and work independently and as part of a team.
- Excellent writing skills combined with the ability to focus on details and follow through on tasks and projects.
- Excellent technical and computer skills and comfort with learning new systems.
- Advanced word-processing, spreadsheet, and database skills; specifically, experience with high-volume data and mail-merge functions.
- Demonstrated ability to problem-solve and proactively recommend solutions.
- Customer service mindset and the ability to communicate diplomatically and accurately to internal and external constituents with integrity, trust, and confidentiality.
- High level of productivity, an ability to handle multiple tasks and a wide-variety of projects, flexibility to changing priorities and deadlines, sound judgment, and sensitivity to donors' concerns.

The following are highly desired skills and experience:

- Experience working in higher education.
- Experience building and maintaining relationships.
- Experience in utilizing donor and alumni database.
- Experience prioritizing and managing several milestone classes and projects.
- and projects.
- Knowledge of Carleton College's Departments, Divisions and our work.