

Employee Name:



MPP / Staff Position Description

HUMAN RESOURCES USE ONLY	
Conflict of Interest (COI) Designated: <input type="checkbox"/> Yes <input type="checkbox"/> No	<u>MPP Positions Only</u>
Mandated Reporter: <input type="checkbox"/> Limited <input type="checkbox"/> General <input type="checkbox"/> N/A	MPP Job Code:
Review Date:	Job Family:
	Job Function:
	Job Category:

Mandated Reporter Per CANRA YES NO

The person holding this position is considered a 'mandated reporter,' under the California Child Abuse and Neglect Reporting Act (CANRA) and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

Please Note: A current and accurate signed Position Description is required for each MPP / Staff position and must be on file in the Center for Human Resources. After completion, the Position Description should be reviewed, signed and dated by the employee, the supervisor and the Center for Human Resources - Classification and Compensation.

Please check one: New Position Existing Position Update

Date:	June 11, 2024
Department & Division:	Planned Giving / University Relations and Development
Employee Name <i>(leave blank if vacant):</i>	
Current Classification & Grade:	Administrative Support Coordinator 12month / Grade 2
FLSA Status: <i>(exempt or non-exempt)</i>	Non-exempt
Working Title:	Planned and Annual Giving Coordinator
Position Number & Job Code:	10009323 / 1035
Working Title & Position Number of HEERA Designated Appropriate Administrator:	Director, Planned and Annual Giving Marketing / 10009399

Employee Name:

I. FUNCTION OF THE EMPLOYING UNIT:

State the basic purpose of the Department/Unit in one brief paragraph. Include the division's DEI statement here.

University Relations and Development (URAD) shares the university's vision and mission underscored in the 2020 five-year strategic plan. The plan identifies five strategic priorities including: Becoming a Premier Public Research University: A New Kind of Hispanic Serving Institution (HSI); Resilience. Designed to Thrive; We Are SDSU; Equity and Inclusion in Everything We Do; and Students at Our Core.

Units of URAD work together to create enduring relationships with alumni, parents, donors, students and the community to generate private support for SDSU students, faculty and a diverse number of programs. URAD handles a range of services encompassing stewardship, events, gift administration, communications and more.

Within URAD, the departments of Development, SDSU Alumni, Planned Giving, Special Events, Donor Relations, Marketing and Communications, Financial Management, Data Management, Prospect Research and Management and Operations are making a difference in the lives of SDSU's 37,000 students.

URAD had another record-setting fundraising year in 2022-2023 with \$136.9M total raised. Other superlatives in 2022-2023 include 16,534 total gifts, 2,254 scholarships awarded and 5,969 first-time donors. The latest fundraising success can be credited to the university's goal of building a world-class university campus, research center, and multi-use stadium in Mission Valley to serve higher education, the public good, and the community's goals and aspirations.

SDSU has been recognized several times for its exceptional development program by the Council for Advancement and Support of Education (CASE). With the support of loyal donors and working alongside SDSU's visionary faculty and staff leaders, SDSU builds lifelong relationships with nearly 500,000 alumni, friends and the community that advance the mission of SDSU.

Diversity, Equity and Inclusion:

University Relations and Development at San Diego State University is committed to upholding, as a foundational belief, a supportive working environment of inclusion that values, honors, and respects, all members of our team and the University community.

We strive to engage in and promote the fair and equitable recruitment and training of URAD staff members, develop meaningful relationships with all groups in our diverse campus community, and share philanthropic stories that highlight the impact of and opportunity for diverse giving by our SDSU community.

University Relations and Development firmly believes that an inclusive environment facilitates critical and creative thinking, and that differences in identities, values, beliefs, and perspectives are fundamental to our mission of generating philanthropic support for the university and its student body.

Within University Relations and Development, the term diversity implies a respect for all and an understanding of individual differences and other characteristics protected by applicable state or federal law, so that all members of the community are treated at all times with dignity and respect.

Employee Name:

We value diversity and inclusion in the working environment and believe it is vital to the fulfillment of the university's mission.

II. PURPOSE OF POSITION:

State the basic purpose of the position in one to three specific statements.

This position provides professional administrative and marketing support, project management, and event coordination as needed for the Office of Planned and Annual Giving at SDSU. The incumbent is responsible for performing a variety of administrative support tasks and supporting marketing objectives for development fundraising teams. These tasks and objectives include implementing integrated solicitation campaigns (direct mail and email), stewarding current and past donors, facilitating data management and analytics of Planned and Annual Gifts.

III. CHANGES IN RESPONSIBILITIES:

- Added Annual Giving responsibilities.

IV. MAJOR RESPONSIBILITIES:

Clearly list the major responsibilities/essential functions in descending order from the most important to the least important. Indicate the approximate percentage of time spent in each (percentages should not be less than 5%). The percentage must total 100%.

Description of Responsibilities:	(%) Percent of Time
<p><u>SDSU Planned & Annual Giving Support</u></p> <ul style="list-style-type: none">• Assist in creating, editing, producing, and releasing solicitation, stewardship, and various communication materials for alumni, parents, friends and donors of the university, as well as various internal and external contacts including emails, video production, events, and social media content.• Assist with the planning and coordination of special events, including consulting with directors and outside vendors to establish goals, services required and payment schedules.• Work with various colleges and areas in Development to create integrated solicitation campaigns.• Help create, edit, implement solicitation and stewardship materials for engagement officers.• Work with URAD Data Management to pull data sets and coordinate audience segmentation for solicitations and stewardship. Upload completed data sets into Anthology (iModules), Five9, Ellucian CRM Advance, Encompass, and other systems as needed. File contact reports after materials have been sent.• Assist Philanthropic Marketing Analyst with online giving page creation, website edits, form management, and reporting as needed.	35%

Employee Name:

Description of Responsibilities:	(%) Percent of Time
<ul style="list-style-type: none">● Serve as the initial contact for donor and prospect requests made in response to solicitation and stewardship outreach and act as source of information for internal and external constituents.● Assist with scheduling partnership meetings with URAD Development Officers to discuss funding projects.● Work with the URAD Development Officers on exclusions of assigned prospects from Annual and Planned Giving solicitations and stewardship.● Work with Alumni Financial Management to maintain invoices and submit purchase orders with proper documentation.● Greet and assist visitors and interface with donors and prospects.● Coordinate phone and e-mail appeals, as well as electronic responses to inquiries.● Manage prospects for the development officers as needed.● Maintain tracking systems to assist with cultivation, solicitation and stewardship of donors.● Prepare briefings and agendas for donor and qualification visits to support assigned development team and senior leadership.● Manage donor stewardship efforts and tracking (birthday cards and Heritage Society Welcome communications, football and basketball tickets).	
<p><u>Administrative Support</u></p> <ul style="list-style-type: none">● Prepare, type and edit a variety of documents such as general correspondence, memoranda, bios, charts, form letters, presentation materials, forms, proposals, reports, announcements and bulk mailings with production and distribution responsibilities.● Provide meeting support: schedule and arrange meetings, create agendas, providing assigned fundraising team and college leadership with materials for meetings related to meetings, agenda, fundraising progress, etc.● Maintain a complex system of filing both hard copy files and digital.● Coordinate travel arrangements for the development team.● Photocopy, collate, assemble and distribute documents, forms and reports● Create, maintain and search various databases with the ability to manipulate the records to produce lists, mailing labels and merged letters.● Establish and maintain a library of resource materials for the development team.● In supervisor's absence, respond where appropriate to matters requiring attention.● In partnership with URAD's marketing unit and the assigned fundraiser team facilitate the creation of marketing materials, such as flyers, invitations and donor impact stories.● Record planned gifts and their respective marketing efforts.● Prepare a variety of documents to include travel requests, check requests, purchase requisitions, travel claims and advances and reimbursement forms.	35%

Employee Name:

Description of Responsibilities:	(%) Percent of Time
<ul style="list-style-type: none"> ● Monthly reconciliation and summary of credit card activity and follow-up. ● Prepare Planned and Annual Giving orientation folders for new URAD staff. ● Route planned gifts for donor and/or internal signatures ● Work with IT and Operations to keep TARPs updated. ● Assist with planned gift processing packets for Gift Administration and Reporting including gift transmittals and present value calculations. ● Assist in estate administration documentation, routing, and tracking. ● Digitize, audit, and maintain planned giving files. ● Organize, track and log promotional items. 	
<p><u>Database Support</u></p> <ul style="list-style-type: none"> ● Prepare donor and prospect lists utilizing Ellucian and criteria established by team members. ● CRM record updates as needed. ● Reflect all donor and prospect activity in Ellucian, enter contact reports, mailing items, etc. ● Utilize web and other URAD donor files and database tools for preliminary research of prospects and create donor profiles as needed. ● Maintain files in conjunction with prospect research. ● Create proposals and manage prospects on behalf of fundraisers. ● Provide donor/alumni record updates to Gift Administration and Reporting and Advancement Services regarding gift information, address changes, donor status updates, contact reports and proposal submissions. ● Prepare college gift reports as requested. ● Maintain Heritage Society Gift Society membership in CRM. ● Maintain Planned and Annual Giving Involvement codes in CRM. ● Using SDSURF MyRF, run various reports on college and team funds to provide fundraising team and college leadership with funds balances and fundraising progress. ● Monitor deceased entity reports weekly and pull planned giving files (hard copies and digital as needed). ● Record planned gift intentions and payments in Bequest Manager database and run reports as necessary. 	25%
<p><u>Special Projects</u></p> <ul style="list-style-type: none"> ● Special projects and other duties as assigned. 	5%
<p>Total =100%</p>	100%

V. LEAD WORK DIRECTION OVER OTHERS:

Employee Name:

List of individuals the incumbent supervises/leads. Indicate the type of supervision, whether direct (directly supervises the position and conducts performance evaluation) or general (acting in a lead capacity or assigning work).

Classification	Working Title	Type of work direction (Direct or General)
N/A		

VI. POSITION REQUIREMENTS:

A. List education and years of experience required that are based on the classification standards.

Entry to this classification requires a fully functional knowledge of and skill in standard office procedures and practices, as well as an ability to understand and operate in a variety of organizational structures. Additionally, incumbents are expected to have a thorough knowledge of English grammar, spelling, and punctuation and be able to clearly communicate orally and in writing. Some positions may require a knowledge of business mathematics beyond basic arithmetic. The ability to use and quickly learn new office support technology systems and software packages is also a prerequisite.

These qualifications would normally be obtained through a high school program, technical/vocational program, or their equivalents combined with several years of related office work experience.

B. Skills, knowledge, and abilities required for this position that are based on the classification standards

- Excellent oral communication skills.
- Excellent writing skills.
- Demonstrated ability to maintain confidentiality.
- Experience to be fully functional in all technical aspects of work assignments.
- Ability to independently handle multiple work unit priorities and projects.
- Ability to draft and compose correspondence and standard reports.
- Comprehensive and detailed knowledge of the university infrastructure, policies, and procedures.
- Thorough mastery of English grammar, punctuation, and spelling.
- Expertise in using office software packages, technology, and systems.
- Ability to interpret and apply policies and procedures independently and use judgment and discretion to act when precedents do not exist.
- Ability to troubleshoot most office administration problems and respond to all inquiries and requests related to work area.
- Ability to understand problems from a broader perspective and anticipate the impact of office administration problems and solutions on other areas.
- Ability to analyze operational and procedural problems and develop, recommend, and evaluate proposed solutions.
- Ability to perform business math, analyze budgetary data, and make accurate projections requiring some inference.
- Ability to effectively write and present own reports.
- Ability to effectively handle interpersonal interactions at all levels and handle highly sensitive interpersonal situations.

Employee Name:

- Ability to use negotiation and persuasion skills to achieve results and expedite projects.

C. Specialized skills required for this position

- Ability and availability to travel and attend events or perform duties outside of normal work hours (may include weekends) on and off campus.
- Experience with Ellucian (or similar financial and biographical database).
- Experience in performing basic prospect research and data analysis.
- Experience in coordinating meetings and special events.
- Experience with marketing and communications.
- Experience in generating emails, letters, cards, invoices, etc., using mail merge functions.

D. License and Certification Required (I.e., Driver's License and Grade, Certification, etc.)

Valid California driver's license within 10 days of hire.

VII. PREFERRED QUALIFICATIONS:


- A minimum of four years of progressively responsible administrative support, marketing/or communications experience.
- Experience working in higher education or public sector setting.
- Experience working in a fundraising/development environment.
- Experience in processing reimbursements for travel, mileage, reimbursements, payables, and procurement.

VIII. SIGNATURES:

The signature indicates position description is an accurate and correct statement of duties and responsibilities assigned to the position. (Limited to 3 Signers as listed below)

Incumbent's Signature/Acknowledgment

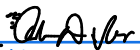
Date


Stephanie Gadd (Jun 13, 2024 10:36 PDT)

Jun 13, 2024

Appropriate Administrator Signature

Date


Adrienne Vargas (Jun 13, 2024 11:03 PDT)

Jun 13, 2024

Vice-President, University Relations and Development

Date



Jun 13, 2024

Classification & Compensation Services

Date

Employee Name:

Attachment A

Complete for all positions

To comply with the provisions of the Americans with Disabilities Act, specify the physical, mental, and environmental conditions of the essential functions of the job, please complete the sections below.

Physical Summary: Choose one description out of the categories below that best describes this position.

Sedentary Work: Involves mainly sitting. Walking and standing are minimal. Lifting is limited to lightweight objects (10 pounds or less).

Light Work: Job involves some lifting of medium weight objects (10-20 pounds) and/or 10% -20% of the job involves standing or walking.

Medium Work: Job involves lifting heavy-weight objects (20-40 pounds) and/or 20%-40% of the job involves standing, squatting, kneeling, or walking. May require pushing or pulling objects within the weight limits.

Heavy Work: Job involves lifting more than 40 pounds. Approximately half of the incumbent's time will be spent walking, standing, squatting, kneeling, or climbing.

Use the codes below for each of the items which most accurately describe the extent of the specific activity performed in this position.

"C" = constantly or 6-8 hours per day

"O" = occasionally or up to 3 hours per day

"F" = frequently or 3-6 hours per day

"N" = never

Physical Requirements of the Position		Mental Requirements of the Position	
N	Bending (neck)	F	Reading & Comprehending
N	Bending (waist)	O	Writing
N	Climbing	O	Performing Calculations
N	Crawling	O	Communicating Orally
N	Kneeling	O	Reasoning & Analyzing
N	Pushing/Pulling	O	Decision Making
C	Sitting	O	Directing/Coordinating Others:
N	Squatting		Other:
O	Standing	Environmental Working Conditions	
N	Twisting (neck)	N	Exposure to variations in temperature/humidity
N	Twisting (waist)	N	Exposure to chemicals, gases, dust or fumes
O	Walking	N	Operates machinery or drives motorized equipment
N	Handling Objects	N	Exposure to bio-hazards
N	Manual dexterity	C	Working in normal office environment
N	Reach above/below shoulder	N	Working outside with various weather conditions
N	Using foot controls	N	Uses specialized equipment
	Other:		Other:

Employee Name:

Attachment B

Complete for all positions

Sensitive Position: For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the [CSU Background Check Policy](#).

Consideration for designation as a sensitive position per HR Technical Letter 2017-17		
1. Does this position have responsibility for the care, safety, and security of people (including children and minors), animals, and CSU property?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Sexual offender registry check for those who perform work involving regular or direct contact with minor children and those who are identified as mandated reporters of child abuse and neglect under Executive Order 1083 and California Penal Code §11165.7(a).
2. Does this position have access to and responsibility for detailed personally identifiable information about students, faculty, staff, or alumni that is protected, personal, or sensitive?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Access to Level Protected Level 1 Data: (i.e., Passwords, DOB, Credit Card Numbers, SSN's, Medical Data, Law Enforcement Records, etc.) - Link to or incorporate ICSUAM pages.
3. Does this position have access to student records?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	FERPA (Access to student education records)
4. Is the position responding for recording/reporting Clery Data?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Clery Act Basics
5. Does the position have access to protected health information?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	HIPAA
6. Will this position be an active/participating member of the SDSU Emergency Operations Team?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	EOC Member
7. Does this position have responsibility for operating commercial vehicles, machinery or equipment that could pose environmental hazards or cause injury, illness, or death?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Motor Vehicle Records/Licensing Check is required. CA Defensive Driver
8. Does the position influence or make decisions regarding real property, real property acquisitions and/or leaseholds, land use and/or development?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 1
9. Does the position influence or make decisions regarding the purchase of goods, service or construction work? Note: Having a procurement card is not qualifying if the individual is limited to making directed and supervised purchases from established vendors.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 2

Employee Name:

10. Does the position influence or make decisions regarding the investment of SDSU/CSU funds.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 5
11. Does the position influence or make decisions regarding the sale of campus goods, services, products, or commodities (including agricultural commodities), which are sold by the campus?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 6

Employee Name:

Attachment C

Complete for **MPP Positions Only**

Mental Effort:

Enter frequency of occurrence for all applicable activities using the following key:

1=Never Occurs 2=Seldom Occurs 3=Sometimes Occurs 4=Occurs Often 5=Almost Always Occurs

<u>Planning</u>		<u>Staffing</u>	
1	Forecast	1	Define Roles
1	Set Program Goals	1	Give Input to Position Descriptions
1	Determine Budget Allocations	1	Determine Selection Criteria
1	Establish, Implement, Revise Policies	1	Recruit/Interview/Select
		1	Orient Staff
<u>Organization</u>		<u>Employee Relations</u>	
1	Describe Relationships Between Functions	1	Initiate Corrective Action
1	Define Department/Divisional Structure	1	Authorize Formal Discipline
2	Establish Priorities to Meet Goals	1	Administer Collective Bargaining Agreements
1	Schedule Work for Employees	1	Prepares/Investigates Grievance Awards and Complaints
1	Implement procedures	1	Formulates/Represents University Position for Formal Grievances/Complaints
2	Determine work methods		
5	Balance multiple tasks/projects		
<u>Direction/Leadership/Supervision</u>		<u>Performance Evaluations</u>	
1	Educate	1	Determine Performance Standards
1	Delegate	1	Authorize/Approve Awards
5	Coordinate	1	Prepare Performance Evaluations
1	Coach/Train/Develop	1	Observe/Follow-Up on a Daily Basis
1	Recommend Formal Training	1	Correct Work/Behavior Problems
1	Motivate		
1	Instruct/Demonstrate		
1	Schedule Staff/Readjust Schedule		
<u>Organization</u>		<u>Other</u>	
1	Describe Relationships Between Functions		
1	Define Department/Divisional Structure		
2	Establish Priorities to Meet Goals		
1	Schedule Work for Employees		
2	Establish deadlines		
1	Implement procedures		
2	Determine work methods		
5	Balance multiple tasks/projects		

Employee Name:

Attachment D

Department Organization Chart

Instruction: Please insert an image of your department's organization chart and highlight where this Position Description falls within the chart.

