



POSITION DESCRIPTION

Department: University Development and Alumni Engagement

Classification Title: Administrator I

Working Title: Director of Gift Administration

FLSA Status: Non-Exempt Exempt

Incumbent:

Position Summary

California Polytechnic State University (Cal Poly) is a nationally ranked, four-year, comprehensive public university located in San Luis Obispo, California. The emphasis of the University is a "Learn by Doing" educational experience for its more than 20,000 students. The primarily undergraduate student body is attracted to the University's commitment to small class sizes, hands-on learning, and an emphasis on student success.

The role of the University Development and Alumni Engagement (UDAE) Division is to foster strong relationships with internal and external partners to enhance support for Cal Poly. University Development and Alumni Engagement establishes and implements an overall advancement program, including coordinating fundraising, donor relations, gift processing, trust and endowment management, training and systems support for the donor database, and Cal Poly Foundation support and administration. Equity, Diversity, and Inclusion are core values at Cal Poly and UDAE is committed to a continuous process of learning and updating practices to support systemic evolution toward equity, diversity, and inclusion for our team and constituents.

Under the direction of the Associate Vice President for Administration and Engagement, the Director of Gift Administration is responsible for oversight, supervision and leadership of the Gift Administration Department. The Gift Administration team is responsible for directing all gift processing functions and related biographical updates for campus fundraising activities. Gift Administration processes more than 15,000 gifts and pledges annually and the department structure currently includes five professional staff positions. The Director will be responsible for the oversight and leadership of the department, including its budget, and will play a key role in developing processes and policies that align with Council for Advancement and Support of Education (CASE) and accounting standards and IRS guidelines and assist with the Customer Relationship Management (CRM) implementation.

Duties and Responsibilities

The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

Essential Job Functions

1. Manages the Gift Administration Department, which is responsible for the receiving, tracking, updating and reporting of gifts and pledges; degree information for alumni; gifts acknowledgments and receipts; entity addresses, marital status, employment information, and other biographical, gift, and membership information.
2. Recruits, hires, supervises, and evaluates Development Support Services staff.
3. Develops and manages long-range goals and action plans for the Gift Administration Department; modifies staffing, assignments, priorities and expenditures to meet goals.

Daily
90%

4. Evaluates data processing and information management needs of development program areas and applies department resources to meet needs.
5. Provides leadership on matters pertaining to advancement database policy and procedures, gift recording, and functional requirements/enhancements. Oversees the coordination of appropriate posting and deposits of contributions in accordance with applicable regulations and audit recommendations.
6. Oversees the implementation of University Development and Alumni Engagement Division policy and procedures to comply with CASE Reporting Standards, IRS regulations for charitable contributions, State and Federal regulations regarding privacy, release and appropriate use of information, and Cal Poly Foundation and State Business Office accounting procedures.
7. Collaborate with the Finance Team at Foundation Auxiliary to assure financial compliance at all levels including assisting with Philanthropic Foundation audits and other financial related tasks, when appropriate.
8. Collaborate with Data and Systems and campus ITS on review of data, integrity projects, CRM conversion and on-going management and system improvements. Serves on the division's data governance committee.
9. Partners with UDAE colleagues on reviewing gift agreements, solicitations, fundraising events, and other fundraising initiatives and campaigns.
10. Oversee the preparation of external reports, including the Voluntary Support of Education (VSE) survey and internal reports such as weekly gifts & pledges reports, Philanthropic Activity Reports (PARs), and analysis of private support.
11. Oversee the department budget, including preparing the annual budget, monitoring and tracking monthly expenditures, and providing year-end projections. Authorizes all expenditures and purchases from department operating budget.

Related Job Functions

As Needed

10%

1. Perform other job-related duties and special projects as assigned.
2. Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.

Required Education, Experience, and Credentials

Education and Experience:

- A bachelor's degree in a related field and 5 years of progressively responsible experience in management with at least three years of aggregate experience in Development Support Services.
- Additional qualifying experience may be substituted for the required education on a year-for-year basis

Licenses, Certificates, Credentials:

- N/A

Required Skills, Knowledge, and Abilities

- Ability to plan, implement, and manage a variety of projects simultaneously. This involves a high level of independent thinking, creativity, sensitivity to changing priorities, an understanding of the principles of philanthropy and enthusiasm for a dynamic and changing work environment.
- Extensive knowledge of electronic databases employed in providing Gift Administration and annual fund solicitations.

- Knowledge of the financial structure of donations, to include cash, gifts-in-kind, stocks, and securities.
- Ability to perform record keeping, using principles of accounting, budgeting, etc.
- Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines. Ability to interpret, communicate, and apply policies and procedures. Ability to analyze information and data from a variety of sources and present information and recommend solutions.
- Ability to use sound judgment, discretion, tact, and a willingness to take initiative. Ability to represent Cal Poly and University Development in a positive manner on campus and with external constituencies.
- Strong interpersonal skills and the ability to effectively interact and communicate with diverse constituencies both inside and outside the University, while maintaining a very high level of diplomacy and professionalism.
- Ability to maintain high standards of conduct and confidentiality dealing with various internal and external constituencies.
- Ability to work with a variety of internal and external stakeholders with competing priorities.
- Must have the ability to initiate a project and carry it to completion and be able to handle many details in a well-organized and timely manner.
- Ability to conceptualize and implement several systems to track and monitor various development functions across campus.
- Excellent written and verbal communication skills and presentation experience.
Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

Preferred Skills and Experience

- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience in a higher education or similar development setting.

Special Conditions

- Must be able to work additional hours, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis. Must be able to work nights and weekends to complete projects on a deadline.
- Perform work involving regular physical activity which may require the ability to safely move up to 50 pounds.
- Must be willing to travel and attend training programs off-site for occasional professional development.
- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position is a "designated position" in the California State University's Conflict of Interest Code. The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission.
- Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.
- This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

INCUMBENT: I have read this position description and understand its contents.

INCUMBENT NAME

SIGNATURE

DATE

SUPERVISOR: I certify that all statements on this form are complete and accurate.

IMMEDIATE SUPERVISOR NAME AND TITLE

SIGNATURE

DATE

DEAN/DEPARTMENT HEAD: I certify that all statements on this form are complete and accurate.

DEAN/DEPARTMENT HEAD NAME AND TITLE

SIGNATURE

DATE

HUMAN RESOURCES USE ONLY

Employee ID#: _____	REQUEST FOR:	CLASSIFICATION INFORMATION
Position Number: _____	<input type="checkbox"/> Update Review for File	Classification Title: Admin I
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 3318/1
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: M80
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement Recruitment	MPP Job Code: U-07-04
<input type="checkbox"/> COI Position		Classifier Initials: SJ
Recruitment Number: _____		Date: 09/18/24