

Draft Classification Standards – Rev. 3/29/2024
Advancement Professional Series

Class Title	Class Code	Issue Date	FLSA
<i>Advancement Professional I</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Advancement Professional II</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Advancement Professional III</i>	XXXX	XXXX	<i>Exempt*</i>

OVERVIEW:

Positions classified within the Advancement Professional series are responsible for supporting fundraising efforts of the university to secure philanthropic support in order to advance the university’s mission and strategic priorities. Advancement roles include annual giving campaigns, donor relations and stewardship, and development of advancement strategies including related communication and marketing campaigns.

Positions are assigned to classifications within the series based on the scope and complexity of advancement activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include, but are not limited to, annual campaign planning and execution; cultivating relationships with donors, alumni, and other key stakeholders; event planning for special events to cultivate and involve prospective or current donors; drafting advancement communications, fundraising appeals, and impact stories, or campaign updates. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels within the series.

Advancement Professional I – Entry-level professional who applies basic professional concepts to resolve problems of limited technical scope and complexity; normally operates under detailed guidelines and work is reviewed for accuracy. Assignments are routine in nature and involve performing various analytical duties to coordinate fundraising campaigns and donor outreach. Follows standard practices and procedures. Conducts analysis of alternative options utilizing data and information. Routinely interacts with stakeholders, donors, and prospects while representing the university.

Advancement Professional II – Professional who applies acquired job skills, and knowledge of advancement policies, processes, and procedures to complete significant assignments, projects, and tasks of moderate technical scope and complexity. Draws from prior experience to exercise judgment to determine appropriate action Provides input for new programs and procedures.

Advancement Professional III – Professional who applies advanced job skills, in-depth organizational and stakeholder acumen, and project management skills to complete substantive assignments, projects, and related work of significant technical scope and complexity. Exercises advanced discernment to determine appropriate action. May require the development of new approaches, techniques, and innovation to address issues. Works with various stakeholders to advance university goals.

* This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee’s actual exemption status may differ based on salary rate and actual duties performed.

DISTINGUISHING CHARACTERISTICS

Positions in this classification focus on supporting advancement and fundraising opportunities. In-person solicitation and building relationships with donors are not typically performed in this classification.

TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (*May include but are not limited to*):

- *Fundraising and Donor Engagement* – Secures financial support for the institution through fundraising efforts. Identifies opportunities and supports the university in maintaining relationships with donors, alumni, and other stakeholders to cultivate support and engage them in the organization's mission. Develops and implements fundraising plans under the guidance of management. Collaborates with university leadership to set fundraising goals, identify funding priorities, and create comprehensive strategies to achieve those goals.
- *Donor Stewardship and Relationship Building* – Supports the university's effort to build strong relationships with donors, alumni, and key stakeholders. Establishes connections, maintains regular communication, and stewards relationships to ensure long-term engagement and support. In collaboration with management, develops programs and initiatives to involve donors and alumni in fundraising, mentorship, volunteering, scholarships, and other opportunities to support the institution.
- *Donor Recognition* – Recommends and implements comprehensive plans to recognize donors at various giving levels, including acknowledgement letters, plaques and naming opportunities, donor events, and regular updates on the impact of donations.
- *Advancement Data Management* – Utilizes donor management systems and databases to track donor interactions, manage gift processing, and generate reports. Ensures accurate and current records to support effective donor stewardship and fundraising strategies.

ADVANCEMENT PROFESSIONAL I

Under direct supervision, performs entry-level technical and professional work within the advancement field including gathering and analyzing data; producing reports; assisting in advancement activities; representing the university and ensuring compliance with terms and conditions and applicable regulations and laws. Performs less complex assignments following detailed and established procedures. Work is regularly reviewed for understanding of professional concepts and compliance with policies and procedures.

Work assignments typically include some or all of the following:

- ◆ Gathers and analyzes data to support advancement activities.
- ◆ Serves as day-to-day contact for advancement inquiries.
- ◆ Researches and identifies prospects and current donors for portfolios. Contacts and schedules prospects for meetings.
- ◆ Edits and updates donor profiles.
- ◆ Uses tracking systems to maintain detailed records of donor contacts.

- ◆ Prepares standardized donor recognition and acknowledgements, tributes for memorialized donors, and related communications and/or recognitions.
- ◆ Provides planning and communication support for fundraising and annual giving campaigns.
- ◆ Plans and coordinates fundraising event logistics.
- ◆ Provides work direction to volunteers, student employees, and administrative staff as needed.
- ◆ Consults with other advancement professionals for direction in responding to complex or more difficult questions and situations.
- ◆ Develops knowledge and understanding of the standard practices and terminology of advancement and donor relations including any related policies.

MINIMUM QUALIFICATIONS:

Knowledge and Skill:

- ◆ General professional knowledge of advancement and fundraising tactics.
- ◆ Demonstrated communications and interpersonal skills to collaborate effectively with internal and external stakeholders and potential donors.
- ◆ Skill in following guidelines and providing input and feedback as required and applicable.
- ◆ Ability to work independently and as part of a team, with a donor and stakeholder service-oriented approach.
- ◆ Flexibility to adapt to changing priorities and deadlines.
- ◆ Strong attention to detail and accuracy.
- ◆ Analytical and math skills to complete research and reconcile financial accounts.
- ◆ Organizational skills to plan, organize, and prioritize work.
- ◆ Computer skills to appropriately use technology and relevant software packages.

Experience and Education:

Equivalent to a bachelor's degree in a related field. Relevant education and/or experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis.

ADVANCEMENT PROFESSIONAL II

Under general supervision, administers advancement campaigns, programs, and policies. Work is reviewed for soundness to ensure the successful execution of events, donor and stakeholder engagement, and communications. Decision-making requires interpretation and knowledge of advancement best practices and procedures; event program or annual campaign/giving guidelines; and organization policies and protocols. Works independently on most day-to-day assignments with general supervision on new assignments or projects to ensure accuracy and alignment with objectives. Handles multiple work priorities and is accountable for own work results.

In addition to duties performed by the Advancement Professional I, the Advancement Professional II typically performs the following duties:

- ◆ Collaborates with prospect research team and other stakeholders to identify potential donors, advancement trends, and initiatives.

- ◆ Conducts research and analysis to identify emerging trends and best practices in advancement and philanthropy.
- ◆ Gathers, reviews, analyzes, and summarizes information and findings regarding donations, donor engagement, and/or prospects in support of advancement strategies and engagements.
- ◆ Prepares reports on fundraising progress, donor engagement, and campaign outcomes.
- ◆ Researches and interprets regulations and guidelines in support of multiple advancement related projects and campaigns.
- ◆ Collaborates with the marketing and communications team to develop content for advancement communications. Coordinates the production and distribution of advancement materials, such as brochures and donor recognition publications.
- ◆ Oversees event planning logistics.
- ◆ Plans and implements a coordinated program of fundraising activities. Monitors project timelines, deliverables, and reporting requirements for multiple advancement projects, campaigns, and events.
- ◆ Recommends improvements in processes, procedures, and operating equipment.
- ◆ Creates tracking systems to maintain detailed records of donor contacts.
- ◆ May provide lead work direction and training to staff and student employees. Orients and interacts with donors and coordinates work.

MINIMUM QUALIFICATIONS:

In addition to Advancement Professional I knowledge and skill requirements, work assignments typically require:

- ◆ Working knowledge and understanding of advancement principles and current best practices.
- ◆ Demonstrates competence in independently applying judgment to resolve non-standard problems and issues. Includes interpretation of applicable regulations, standards, and guidelines.
- ◆ Strong analytical and organizational skills to plan, organize, prioritize, and ensure the successful completion of fundraising campaigns or events within time and budget constraints.
- ◆ Strong communications and interpersonal skills to effectively coordinate multiple stakeholder relationships and guide the development of appropriate fundraising and promotional materials.
- ◆ Ability to effectively lead and train others.
- ◆ Knowledge of event planning, fundraising, budgeting, and accounting principles and processes.
- ◆ Proficiency in using advancement or donor management software and financial systems.

Experience and Education:

Equivalent to a bachelor's degree in a related field and two years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

ADVANCEMENT PROFESSIONAL III

Working independently under general supervision, performs advanced fundraising and/or advancement work. Works on large and/or complex fundraising campaigns and important donor profiles and interactions under the direction of management. Demonstrates advanced discernment in determining appropriate plans and methods to achieve advancement and fundraising goals while ensuring compliance with laws, regulations, and organizational policies. In collaboration with management, assesses, formulates, and evaluates programs, policies, and procedures. Decision-making is based on advancement best practices; substantial advancement experience; advanced knowledge of relevant federal, state, and local regulations; and university policies and protocols. Work is performed largely independently with general supervision focused on ensuring alignment with overall objectives. Handles multiple work priorities and may provide lead work direction to other professional or administrative staff with accountability for results.

In addition to duties performed by the Advancement Professional II, the Advancement Professional III typically performs the following duties:

- ◆ Executes and may develop comprehensive recurring giving programs, including follow up with unmanaged prospects.
- ◆ Proposes and creates online giving strategies which includes site vendor management, content development, performance tracking, and data segmentation.
- ◆ Collaborates with annual campaigns, stewardship colleagues, and strategic communication to develop compelling content for advancement and marketing materials.
- ◆ In collaboration with management, designs new and recommends improvements to existing advancement policies, processes, and procedures.
- ◆ Designs training programs for advancement team members.
- ◆ Leads work of and mentors other professional, administrative staff, and contractors.
- ◆ Complex fundraising campaigns are typically not routine in nature, may require coordination between multiple stakeholders.

MINIMUM QUALIFICATIONS:

In addition to Advancement Professional II knowledge and skill requirements, work assignments typically require:

- ◆ Advanced knowledge and understanding of advancement, development, fundraising, and/or donor engagement practices and policies.
- ◆ Demonstrated competence in applying advanced judgment to resolve difficult and complex problems and issues.
- ◆ Thorough knowledge and skill in applying and interpreting applicable regulations, standards, and guidelines. Ability to make recommendations for changes based on interpretations and principles of professional practices.
- ◆ Advanced analytical and organizational skills to prioritize and execute the fulfillment of advancement campaigns and to successfully manage projects within time and budget constraints.
- ◆ Advanced communications and interpersonal skills, including political acumen, to build partnerships and communicate effectively with multiple stakeholders in a diverse environment. Ability to effectively present ideas and training and successfully engage with prospective donors.
- ◆ Advanced skill in effectively mentoring or overseeing the work of others and training staff on advancement practices and procedures.

Experience and Education:

Equivalent to a bachelor's degree in a related field and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

DRAFT