



Position Title:	Gift Records & Data Analysis Manager
Date Modified:	May 2023
FLSA Classification:	Exempt
Reports to:	Head of Institutional Advancement
Position Purpose:	Manages the advancement database, prepares financial reports, enters, tracks, and prepares acknowledgments of contributions received; Coordinates the research of prospective donors, develops mailing lists and supports the advancement department on an administrative level.
Work Hours:	7:15 a.m. – 4:15 p.m.
Work Calendar:	Full Year
PTO Designation:	Staff (Blackout Dates May Apply)

Description

The Gift Records and Data Analysis Manager reports directly to the Head of Institutional Advancement and proactively manages all aspects of gift data entry, processing and receipting, ensuring accurate database content, donor research, and data mining in an effort to meet fundraising goals. The Gift Records and Data Analysis Manager's primary responsibility is to ensure that all donations are accurately recorded and acknowledged and to implement data mining techniques for prospect research to advance the mission of St. Francis and support the school's cultivation, solicitation, and stewardship goals.

Essential Functions & Tasks

- Works to proactively manage and improve all aspects of the donor's experience.
- Establishes and evaluates processes and procedures that are used in measuring the effectiveness of the school's donor services program.
- Develops strategies that reduce organizational risk, increase efficiency of donor recognition, and increase/begin stewardship efforts positively with the donor.
- In coordination with the Business Office, ensures PCI compliance within all aspects of gift processing.
- Stays current on best practices and tax/legal issues related to gift processing and constituent records.
- Coordinates regular and proactive data mining, wealth identification, and prospect screening that contribute to overall advancement fundraising goals.
- Follows established protocol for gift data entry and acknowledgement.
- Manages online donation processing and provides input on online giving presence on the school's website.
- Plans and implements timely and ongoing personal/written/phone contact with volunteers/major donors/potential donors attending events, including thank you letters and data documentation.

- Evaluates all donor services on an ongoing basis, looking for areas to adjust costs and enhance the overall donor experience.
- Maintains knowledge of and compliance with IRS rules governing donations and in-kind gifts from foundations, corporations, and individuals. In addition, keeps staff informed of IRS rules governing gifts to donors and setting fair market values for events.
- Processes and maintains records of all gifts and pledges to the school.
- Prepares receipts and acknowledgments in response to gifts received within 24 hours, when reasonable based on volume.
- Manages and updates development databases and runs mailing lists, including all constituent information.
- Reconciles monthly development figures with the Business Office.
- Supports the development of prioritized and high-quality prospect pools for major gifts.
- Maintains office filing system and other records.
- Prepares quality correspondence for the development staff.
- Generates reminders for all pledges on a monthly basis.
- Generates reports of gifts and pledges for use by the Advancement Office and other institutional committees. Seeks creative and relevant ways to analyze data.
- Organizes and prepares data for all fundraising activities.
- Assists in the production of and execution of development events.
- Produces accurate donor information for the Annual Report and school financial audit.
- Assists in the preparation of the operating budget for development.
- Actively participates in the life of the school where appropriate and relevant to the priorities of the Advancement Department.
- Demonstrates the ability to work well with people at all levels of the organization, warmly developing relationships while simultaneously employing keen judgment.
- Displays strong ability to prepare proposals, reports, and correspondence as necessary.
- Demonstrated ability to work with technology such as the school's website, Veracross database, and displays competency with MS Word, Excel, Power Point, and internet applications.
- Communicates effectively with all constituents in the school environment.
- Assists in assuring that donors are familiar with and adhere to school policies in all areas of the school's operation.
- Knowledgeable about Veracross and uses Veracross' development module and/or other school management software programs.
- Completes administrative duties as required with attention to detail and conformity.
- Performs other duties as assigned by the Head of School and/or supervisor including extracurricular activities.
- Completes various tasks related to the employee's yearly goals and the school's long range and strategic financial plan.
- Assists in maintaining congruence between the school's board-approved Mission Statement, the Long Range and Strategic Financial Plan.

- Adheres to school policies in all areas of the school's operation.
- Represents and promotes the school at various school events.
- Attends required school meetings and special events.
- Actively participates in the life of the school where appropriate and relevant to the priorities of the school.
- Adheres to the Employee and School Handbooks and assists with revisions and updates, when necessary.
- Commits to the Employee Expectations and Standards of Professional Excellence as the non-negotiable foundations for employment at St. Francis Episcopal School and complies with Physical Requirements and Work Environment.
- Is assessed through the Professional Growth and Evaluation Program.
- Employees may be required to work remotely or engage in telework activity as determined in the employer's sole discretion.
- This job description is intended to describe the basic, critical elements of the job and should not be construed as an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job.
- This job description does not constitute a contract. It may be modified or amended at any time as determined in the employer's sole discretion.

Qualifications

- High School diploma; Bachelor's degree preferred.
- A minimum of three years' gift processing experience, preferably in an independent school environment that utilizes Veracross or other similar databases.
- Proven track record of working with tax-related/legal issues related to gift use, processing, and acknowledgment.
- Expert with data mining, wealth identification, screening, and other prospect programs. Experience with databases and data management principles.
- Impeccable attention to detail, exemplary organizational skills, results-oriented and a strong ability to maintain confidentiality.
- Excellent verbal and written communications skills.
- Proven skills in planning, implementation, and follow-through with the ability to articulate the school's vision for fundraising and to execute a plan capable of sustaining that vision.

Physical Requirements and Work Environment

- Occasionally lift 30 pounds.
- Generally, works in standard office conditions and climate.
- May work in varied extreme outside weather conditions during school events, special activities and fundraising events.

- Ability to work in a fast-paced environment dealing with a wide variety of challenges and deadlines.
- May work at a desk and computer for extended periods of time.
- Ability to stoop, bend, kneel, stand, walk, reach.