Saint Michael’s College
Job Description

Job Title: Associate Director for Data Management

Department: Advancement Services in Institutional Advancement

Supervisor or Manager: Director of Advancement Services and The Saint Michael's Fund

Date Created: 3/28/05 Last Revised: 3/28/05 FLSA Status: NE

Our Mission: It is the mission of Saint Michael’s College to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

Major Objectives:
- All gifts and pledges to the College are processed in accordance with IRS & FASB standards, Saint Michael's College Gift Acceptance Guidelines, and applicable CASE standards
- Matching gifts to the College are tracked and followed up on
- Gifts are coordinated and transmitted to the general ledger for access by the Financial Services department
- All staff members are assisted, within IA and the general College staff, with questions regarding gifts, pledges, funds and special projects in a timely and courteous manner
- A secure environment is maintained for gifts of real property, liquid assets, endowment agreements
- The commitment to SMC’s mission is carried out, in all aspects of work, on a daily basis
- The mission of the College is effectively promoted and the IA mission is supported to build life-long relationships with alumni, parents and friends, and to engage alumni and friends of the College as active volunteers and benefactors
- IA policies are adhered to regarding confidentiality of prospect information and database integrity

Essential Duties and Responsibilities:
- Prepares all checks, cash, credit card, electronic, gifts-in-kind, stock gifts, and pledges for entering into Benefactor in a timely and accurate manner
- Sets up all gifts and pledges for transmission to the general ledger on a regular basis
- Generates gift reports for Advancement Services and Financial Services staff
- Works with Financial Accounting Manager to set up new gift designations when needed
- Confirms gifts so that matching corporations can process payment to the College
- Prepares follow-up letters to donors who work for matching gift corporations but did not send a matching gift form
- Assists staff members with questions regarding gifts and pledges
- Helps the Assistant Director for Donor Relations track scholarships and funds
- Generates pledge reminders for Director of Advancement Services
- Assists with annual external audits
- Researches historical data regarding donors and specific gifts to the College for the Associate Director for Advancement Services
- Works with Data Management Specialist, Data Entry Specialist and Information Specialist on the completion of special data projects

Secondary Responsibilities:
- Helps train new staff and work-study students
- Assigns projects to work-study students
- Orders reports for confirmation of graduating students
- Works with Data Management Specialist to code new graduates
- Works with Data Management Specialist and Data Entry Specialist to enter employment information on new students
- Tracks and code parents of students who are on leave or have withdrawn
- Creates files with Data Entry Specialist for new alumni following commencement
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**Positions Supervised:**  
- Assistant Director for Data Management and Donor Relations (1)  
- Data Entry Specialist (1)  
- Work-study students  

**Major Contacts:**  
- Financial Accounting Manager, Financial Services  
- Senior Staff Accountant, Financial Services  
- Executive Assistant, Financial Services  
- Associate Director, Library and Information Services  
- Acquisitions Specialist, Library and Information Services  
- Associate Athletic Director, Athletics  
- Administrative Assistant, Athletics  
- Director of Edmundite Campus Ministry  
- Managing Director of the Playhouse  
- Associate Director of HR-Payroll  
- Payroll Assistant  
- State Street Bank & Trust Company, Specialized Trust Services  
- External Auditors for the College  
- Institutional Advancement staff  

**Demonstrates Excellence:**  
- Shows a steadfast commitment to participating as a member of a fully integrated outreach and development team  
- Possesses excellent interpersonal skills and deals effectively with a variety of constituents in a broad range of relationships and situations  
- Pays very close attention to detail and considers accuracy to be a top priority  
- Gift and pledge data are reported in a timely manner to the Vice President of Institutional Advancement and used in capital campaign reports to the President, Board of Trustees and volunteers who assist the College  
- Adheres faithfully to IRS guidelines regarding acceptance and processing of charitable gifts, processing gifts accurately and helping SMC be successful in positive external audits so that SMC may retain its 501(c)(3) status  
- Prioritizes work well for completion by deadline, always mindful of how own actions will impact all of Institutional Advancement and Financial Services  
- Has gifts processed on time in January and July so that books may be closed and reporting to external auditors and Board of Trustees is available when expected  
- Researches and responds to the many inquiries regarding gifts, pledges involving stock, payroll deductions and planned gifts in a timely and positive manner whether it is within the department or from an outside source  
- Understands well the implications of working with a relational data base and the effects on the entire Benefactor module when making changes and corrections  

**Education and Work Experience:**  
- Associate's degree or equivalent combination of education and experience  
- Minimum of 5 years relevant work experience in gift and bio data systems or a combination of education and experience from which comparable knowledge and skills are acquired  
- Previous experience working with and/or understanding of planned gifts and stock transactions  

**Analytic Skills:**  
- Some analysis of cause-and-effect problems based on a standard approach learned through training, established policy, or the use of established procedures
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**Language and Literacy Skills:**
- Reads and understands basic instructions. Conversational skills including responding to supervisors and co-workers as needed to ask questions, provide information, seek direction and plan work. Some writing is required for position.

**Computer/Technology Skills:**

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**Licenses, Certifications and Other Requirements:**
- None required

**Physical Demands:**
Work is often performed in a typical office environment requiring:
- Sitting in a normal seated position for extended periods of time
- Reaching by extending hand(s) or arm(s) in any direction
- Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard
- Communication skills using the spoken word
- Vision sufficient to see within normal parameters
- Hearing sufficient to hear within normal range
- No or very limited physical effort
- No or very limited exposure to physical risk

While performing the duties of Associate Director for Data Management, the employee must occasionally lift and/or move up to 10 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential functions.

**Additional Requirements for the Job:**
- Good computer and data base skills; ability to train and become an expert in Datatel’s Benefactor module is necessary for handling gifts, pledges and corrections
- Willingness to work hours necessary beyond regular schedule to complete job responsibilities, in a professional and thorough manner, such as working extra hours to accomplish timely processing of gifts to meet the College’s deadlines at the end of each fiscal and calendar year
- Capacity to help staff Reunion and Homecoming weekends, and participate in Commencement, convocations and other College events as defined by supervisor and responsibilities of this position

The above job description in no way states or implies that these duties are the only duties performed by this employee. The incumbent is expected to perform other related duties necessary for the effective operation of the College.