

Human Resources
POSITION DESCRIPTION (HR 120)

CLASSIFICATION: Administrative Support
Coordinator II

DEPARTMENT: OCOB - Dean's Office

WORKING TITLE: Advancement Coordinator

FLSA: Non-Exempt

INCUMBENT:

PURPOSE:

The Orfalea College of Business (OCOB) includes six academic areas (Accounting, Economics, Finance, Industrial Technology and Packaging, Human Resources Management/ Information Systems, and Marketing) that provide three bachelor degree programs, nine concentrations, three minors, and six graduate programs. The College has approximately 2,700 undergraduate students and 130 graduate students. The College has an Advancement Office, Advising Center, Low Income Taxpayer Clinic, Student Success Center, and student Computer laboratory. The College has approximately 100 full- and part-time faculty and over twenty staff members.

Under the general supervision of the Director of Development, the Advancement Coordinator provides administrative support to the Dean, Assistant Dean of Advancement and the Director of Development in matters relating to strategic fundraising and communication objectives for the Orfalea College of Business. This position supports external relations and oversees the administrative process for advancement; coordination of all college events related to fundraising and advancement work of the college; and direct support services for the Dean in his external role and fundraising activities. This position also provides assistance for the alumni and donor/gift tracking system and stewardship program, gift acknowledgements, corporate giving, and annual fund.

In addition, the incumbent works closely with Dean's Office staff and the Dean's Advancement staff, as a team, to plan and coordinate program functions and events, schedule appointments and meetings, research travel arrangements, and prepare travel requests and claims as needed. The incumbent serves as a point of contact, representing the College for corporate representatives, Dean's Advisory Council members, and university staff. These responsibilities regularly involve the resolution of complex problems and sensitive issues, while utilizing research, analysis and the knowledge and the application of policies.

DUTIES AND RESPONSIBILITIES:

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

ESSENTIAL JOB FUNCTIONS Daily 90%

Administrative Management:

- Provide assistance to the Dean to ensure an effective process of greeting and assisting donors and executives in residence.
- Answer incoming phone calls and inquiries, and refer to the appropriate Dean, faculty and/or staff as needed.
- Provide administrative support to the Dean, Assistant Dean of Advancement, Director of Development, which may include, but is not limited to: complete and distribute correspondence, and forms; research travel arrangements and prepare travel requests and claims; schedule appointments and meetings; and maintain staff calendars when requested.
- Coordinate with the University's Donor Relations Program and with the Alumni Relations office.
- Provide day-to-day support for the College's portion of Cal Poly's alumni and donor stewardship programs.
- Complete donor research and summarize contact reports. Generate reports as requested.
- Work collaboratively with the Orfalea departments and staff in the University Advancement Donor Relations Program to provide support for individual stewardship plans.
- Gather narrative and financial information for scholarships, endowments, building projects, major programs, etc. to enable University Development to provide reports for OCOB's major donors.
- Responsible for coordination of written input for contact reports for the College leadership team.
- Manage multiple software platforms to allow easy and complete access for the College leadership team to review contact reports. Enter final contact reports and tasks into the advancement software system after the leadership team vets the information.
- Maintain a current and accurate list of the Dean's Advisory Council members and their terms. Schedule and

support Executive Committee meetings of the Dean's Advisory Council as needed. Ensure that communications with members about meeting locations, dates and agendas occur in a timely manner. Work with Dean to notify members whose terms are expiring.

- Work in collaboration with the advancement team to ensure information and materials are provided upon request to the Cal Poly Fund on a timely basis.
- Serve as primary point-of-contact for Cal Poly Fund and Advancement Services.
- Assist with providing lead work direction to the student assistants that are working in the Dean's Office.

Orfalea Advancement Event Coordination:

- Plan and coordinate special donor, alumni and volunteer events for OCOB. Duties can include, but are not limited to: selection of event sites; design of invitation text; coordination of invitation mailing and RSVP processes; monitoring of event vendors; coordination of overall event logistics; and post-event clean-up activities.
- Lead the planning and coordination of Orfalea Advancement activities in conjunction with the Saturday portion of spring Open House.
- Serve as a point-of-contact for the Cal Poly Alumni Association programs, such as Honored Alumni and Green and Gold Dinner.
- Provide staffing support for college events, such as Dean's Advisory Council meetings and Executives in Residence. Work closely with the College support staff to assist with general event coordination.

Gift Processing & Acknowledgement:

- Serve as the first point of contact for Orfalea departments/programs to interpret and process requests for donor and gift information.
- Coordinate the Orfalea cash, pledge, and in-kind gift processing and acknowledgment operation to ensure timely recognitions of all gifts.
- Create letter templates for acknowledgments and ensure that these templates are modified and updated as needed.
- Research and write gift and special acknowledgment letters as needed for the Orfalea Dean and Assistant Dean of Advancement and Director of Development.
- Supervise student workers who may assist with the research and writing of acknowledgment letters.
- Coordinate and maintain donor and gift records by accurately tracking all gift deposits, investigating discrepancies, and ensure that gifts are properly credited.
- Manage and track Dean's Advisory Council and Executive in Residence giving.
- Receive and process grants from corporations, which involves researching and working with various departments to document goals and support objectives for the use of the funds.
- Update advancement software with biographical, address changes and similar donor record updated information.
- Access query databases weekly to initiate timely thank you letters. Review weekly giving reports and provide source leads for the College advancement team.
- Coordinate and maintain electronic files regarding OCOB donors to support the Orfalea Stewardship Program.
- Coordinate with the College's Financial Analyst in creating and managing a comprehensive and easily accessed gift record that includes gift terms, gift activities, spending, and operational decisions and details. Create summary reports as needed.

Other Job Functions

As Needed

10%

- Coordinate with the College's Financial Analyst on the advancement budget and assist with fund tracking and management.
- Assist with special projects assigned by the Dean, Assistant Dean and/or the Development Director.
- Coordinate with Dean's Office support staff to ensure the Dean's Office is open M-F 8:00 am-5:00 pm.
- Coordinate and process incoming and outgoing mail by handling requests based on knowledge of specific program areas. Copy and distribute materials.
- Perform other duties as assigned.

Minimum Qualifications:

EDUCATION AND EXPERIENCE: High school diploma or its equivalent. Type 45 wpm. ~~Five~~ years of general office support or technical experience. (Training at a vocational school or full-time college education may be substituted for two years of the required experience on the basis of one year of college education for 6 months of experience.)

LICENSES, CERTIFICATES, DEGREES, CREDENTIALS: Possession of a valid driver's license or the ability to

obtain by date of hire.

Required Qualifications (SKAs):

- Thorough knowledge of English grammar, spelling and punctuation; ability to use this knowledge to communicate effectively, both orally and in writing, with a diverse group of individuals. Excellent writing and proofreading skills.
- Excellent communication skills. Ability to effectively communicate both verbally and in writing information in a clear and understandable manner with individuals from within and outside the university.
- Ability to maintain composure and effectively balance a large and varied workload in a fast-paced environment while experiencing frequent interruptions.
- Excellent organizational and time management skills. Ability to independently prioritize, coordinate, and complete tasks and projects through the use of initiative, creative problem-solving, sound decision-making, and follow-through. Ability to plan, organize and coordinate long-range activities and events.
- Demonstrated excellent customer service skills with the ability to maintain a high degree of confidentiality, particularly regarding highly sensitive issues and to present a professional demeanor in various situations.
- Ability to interpret and apply policies and procedures independently, and use judgment and discretion to act when precedents do not exist.
- 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 or budget data, and make accurate projections requiring some inference.
- Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email. Ability to quickly learn new programs and software applications.
- Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
- Ability to train, assign tasks and set priorities for student assistants.
- Ability to quickly develop a thorough working knowledge of University infrastructure, policies and procedures to provide or perform a variety of functions and services in support of advancement program goals.

PREFERRED QUALIFICATIONS:

- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience planning, organizing and coordinating long-range activities and events.
- Experience in advancement (fundraising) environment.
- Experience in event accounting and management practices and a comprehensive knowledge of State, Corporation, and Foundation budget guidelines, including those involving State Hospitality.
- General working knowledge of applicable University infrastructure, campus policies and procedures.

SPECIAL CONDITIONS:

- Must be willing to travel and attend training programs off-site for occasional professional development.
- Must be able to work occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
- 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 Revised July 21, 2017 as a condition of employment.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position classification has been defined as non-exempt and is subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

SIGNATURES:

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

Incumbent Print name	Signature	Date
----------------------	-----------	------

SUPERVISORY: We certify that all statements on this form are complete and accurate.

Immediate Supervisor

Immediate Supervisor Print name and title Signature Date

Dept Head/Director

Dept Head/Director Print name and title Signature Date

Dean/Vice President

Dean/Vice President Print name and title Signature Date

*****HR USE ONLY*****

Employee ID: _____

Position Number: _____

Time-base: _____

Temporary **Permanent**

Doc Coding: _____

Request for:

- Update Review for File
- Classification Review
- New Position Recruitment
- Replacement Recruitment

Recruitment Number: _____

Classification Information:

Approved Classification Title: _____

Class Code/Range: _____

CBID: _____

MPP Job Codes: _____ / _____ / _____

COI: **Y / N**

Classifier Initials: _____ Date: _____