

# Annual Giving Specialist

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**Work type:** Staff

**Location:** Monterey Bay

**Categories:** Unit 9 - CSUEU - Technical Support Services, Administrative, Probationary, Fundraising & Alumni Relations, Full Time

**Classification:** Administrative Analyst/Specialist, Exempt II

**Anticipated Hiring Salary:** Low to mid \$5,000's/month

[CSU Salary Schedule](#)

**Hours:** Full-time 40 hours per week

**FLSA:** Exempt

**Priority Screening Date:** Extended

**Recruitment Status:** Open Until Filled

## ABOUT CSUMB

Powered by an inspiring [Founding Vision Statement](#), [California State University, Monterey Bay](#) (CSUMB) is a mid-sized comprehensive baccalaureate and masters granting university whose staff and faculty help transform student lives through a focus on student success and engagement through project-based learning, service learning in its regional community, and the promotion of multicultural and global perspectives on and beyond campus. CSUMB is both a Minority Serving Institution (MSI) and a Hispanic Serving Institution (HSI) and has a vibrant, diverse student body of over 7,400 students. The university's [Strategic Plan](#) prioritizes inclusive excellence through recruiting and investing in the development of a diverse body of faculty, staff, and administrators. CSUMB's sustainability initiative is to be carbon neutral by 2030. The university's faculty and staff, many of whom live in the East Campus housing development, appreciate living and working so close to the shores of the beautiful Monterey Bay. As one of the 23 campuses in the California State University (CSU) system, CSUMB offers excellent benefits, including access to below-market-rate campus housing and competitive salaries for faculty and staff.

The primary purpose of the Division of University Advancement is to enhance private support to the university. As a main component of the division, University Development develops programs and activities to stimulate the involvement and interest of an ever-growing donor base of alumni, parents, current donors, friends, industry, foundation and corporate prospects. Annual Giving focuses on current giving opportunities by soliciting and cultivating alumni, parents, and friends of the university.

### **PURPOSE:**

Under the general direction of the Associate Vice President for Development, the Annual Giving Specialist is responsible for developing and managing a comprehensive annual giving program and long-term strategy. The incumbent is responsible for maximizing philanthropic support from alumni and friends of the University through direct mail, email, and social media solicitations. The incumbent participates as an integral team member.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES include, but are not limited to, the following:**

#### **Program Administration:**

1. Develops annual giving portfolio and carries out the annual giving plan, including segmented appeals focused on building participation and repeatable gifts generally below \$5,000.
2. Solicitation activities are a combination of direct mail, email, social media, including crowd funding and personal visits. In alignment with University Advancement priorities, the Annual Giving Specialist will not only solicit Leadership Annual Fund gifts through one-on-one visits with known prospects, he or she will execute discovery visits to qualify prospects for further engagement.
3. In collaboration with the AVP develops annual giving fundraising goals and ensures goals are achieved.
4. In collaboration with Advancement Services, requests data on annual giving patterns to improve solicitation techniques, segmentation and predictive analytics.

5. In collaboration with the Advancement team, develops and implements integrated, targeted and segmented annual giving solicitation strategies.
6. Writes/edits solicitations and communication pieces in close collaboration with University Communications.
7. Document and manage all personal visits and appropriate phone and email contacts in the database. Manage next steps, pledges, and recommended actions and ensure that they are recorded and follow-up appropriately.
8. Works closely with Advancement Services and Prospect Research in identifying, qualifying, cultivating, soliciting and stewarding annual giving donors.

#### **Publications Development and Coordination:**

1. Coordinates the design and production of all written annual giving materials with University Communications as appropriate.
2. Coordinates with University Communications on various social media outlets for Annual Giving communications.

#### **Other Functions:**

1. Supports University Advancement projects and plans.
2. Performs other job-related duties and special projects as assigned.

#### **KNOWLEDGE, SKILLS AND ABILITIES:**

Thorough knowledge of and ability to apply extensive expertise to complex programs and/or administrative specialties, including pertinent laws and regulations. Demonstrated expertise in and advanced knowledge of the principles, problems, and methods of public and business administration and operational and fiscal management. Expertise in administrative survey techniques, operations and systems analysis, statistical and research methods, and the ability to interpret and evaluate results to develop sound conclusions and recommend new or revised policies.

**Skills:** Demonstrated expertise in and advanced knowledge of the principles, problems, and methods of public and business administration and

operational and fiscal management. Expertise in administrative survey techniques, operations and systems analysis, statistical and research methods, and the ability to interpret and evaluate results to develop sound conclusions and recommend new or revised policies. Demonstrated consultative skills in working with internal and external constituent groups. Skill in the research, development and evaluation of policies and programs, including skill in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.

**Ability to:** take initiative and work independently to determine effective approaches to projects and priorities; organize, coordinate, and perform work in various situations where numerous and diverse demands are involved; apply extensive expertise to complex programs and/or administrative specialties, including pertinent laws and regulations; understand problems from a broad, interactive perspective and discern applicable underlying principles to conceive of and develop strategic solutions; effectively present ideas and concepts in written or presentation format and use consultative and facilitation skills to gain consensus; apply extensive expertise to the complexity of maintaining effective university-community partnerships in both face-to-face and online contexts; work with representatives from public and private entities and handle potentially sensitive situations.

### **MINIMUM QUALIFICATIONS:**

Entry to this classification requires general knowledge and skills in the applicable administrative and/or program field with a foundational knowledge of public administration principles, practices, and methods. This foundation would normally be obtained through a bachelor's degree and/or equivalent training and administrative work experience involving study, analysis, and/or evaluation leading to the development or improvement of administrative policies, procedures, practices, or programs.

### **SPECIALIZED SKILLS:**

Experience using database CRMs such as Blackbaud Products, preferably Raiser's Edge NXT/Luminate or other advancement information systems; and Microsoft Professional Suite—especially PowerPoint, Word, Excel, etc.

Demonstrated ability to handle and maintain confidentiality; work independently; and coordinate and prioritize multiple projects for a variety of users, set schedules, and organize, plan, and complete work and tasks.

Thorough mastery of English grammar, spelling, punctuation, editing and spoken language.

### **PREFERRED QUALIFICATIONS/DESIRABLE EXPERIENCE:**

Two years of experience in annual giving fundraising or development work in a nonprofit foundation, college or university with a track record of achieving successful results. Work in a team environment. Excellent interpersonal skills.

Demonstrated success in fundraising, fostering productive external relationships. Familiarity with the university environment and experience working with diverse populations. Multilingual ability, international or multicultural experience, and knowledge of the local region. Knowledge of annual giving campaigns and individual giving programs such as direct mail, Phonathon, and personal solicitation programs is preferred. Demonstrated understanding of and commitment to [CSUMB's Vision](#)

### **SPECIAL CONDITIONS OF EMPLOYMENT & POSITION DESIGNATIONS:**

All offers of employment are contingent upon the successful completion of a background check (including a criminal records check).

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.

This position will have a duty to report to the Campus Title IX Officer information pertaining to victims of sex discrimination, sexual harassment,

sexual misconduct, dating/domestic violence, and stalking as required by [CSU Executive Order 1095](#).

**Sensitive Positions - This position has been designated as a sensitive position with:**

- access to, or control over, cash, checks, credit cards, and/or credit card account information
- access to and responsibility for detailed personally identifiable Level 1 confidential information about students, faculty, staff or alumni that is protected, personal or sensitive as defined in the [CSU Information Security Data Classification Standards](#))
- This position is required to comply with confidentiality requirements outlined in the Department of Education's Family Educational Rights and Privacy and California's Educational Code Chapter 13 regarding sensitive student issues.

Must possess and maintain a valid license to drive in the State of California, pass the Defensive Training Class, and be insurable under the University's liability coverage.

**PHYSICAL ENVIRONMENT:**

Office environment with standard equipment and tasks. Position requires working at a computer and desk for extended periods of time. May require travel between campus offices and off-campus locations.

There are components of this job which are deemed essential on campus. This position will primarily work on the main campus, with occasional work from home. This position requires working on campus with students. The health and safety of our students, faculty, and staff remain our highest priority. In the fall, students, faculty, staff, and the community can expect that masks will be required and that the appropriate degree of social distancing will be in place in all areas based on evolving guidance. Additionally, all students, faculty, and staff are encouraged to be vaccinated before coming to campus. All community members who work or attend class on campus should expect to participate in a random or periodic

testing system. CSUMB will communicate more information about vaccination requirements and testing protocols when the details become available.

### **BENEFITS:**

CSUMB offers a premium benefit package that includes outstanding vacation, health, dental and vision plans; membership in the California Public Employees Retirement System (CalPERS); and 14-paid holidays a year. For more information, visit [CSU System Benefits](#). Additionally, University Corporation at CSU Monterey Bay provides access to affordable campus housing based on availability; visit [Employee Housing](#) for more information.

### **APPLICATION PROCEDURE:**

For full consideration, applicants must complete the required online application prior to the priority screen date found at [csumb.edu/jobs](https://csumb.edu/jobs). Application submissions received after the application screening date will be reviewed at the discretion of the University. Materials submitted become the property of CSUMB and will not be returned.

***CSUMB is not a sponsoring agency for staff or management positions.***

Reasonable accommodations will be provided for qualified applicants with disabilities who self-disclose by contacting University Personnel at (831) 582-3389. All employees must be eligible for employment in the U.S.

### **GENERAL INFORMATION:**

CSUMB hires only individuals lawfully authorized to work in the United States and is an E-Verify employer. In compliance with federal crime awareness and campus security legislation, including the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics, you can view the notice of availability and access the Cal State University, Monterey Bay annual security and fire safety reports at <https://csumb.edu/clery/asr-and-fsr-notices-availability/>.

CSUMB requires faculty, staff, and students who are accessing campus facilities to be immunized against COVID-19 or declare a medical or religious exemption from doing so. Any candidates advanced in a currently open search process should be prepared to comply with this requirement. The systemwide policy can be found at <https://calstate.policystat.com/policy/9779821/latest/> and questions may be sent to [universitypersonnel@csumb.edu](mailto:universitypersonnel@csumb.edu).

CSUMB is a smoke and tobacco-free campus.

**AFFIRMATIVE ACTION/EQUAL OPPORTUNITY EMPLOYER:**

CSUMB is an Equal Opportunity Affirmative Action employer seeking to recruit and support a broadly diverse community of faculty and staff. We value and celebrate diversity in all its forms and strive to foster an inclusive culture built on respect that affirms inter-group relations and builds cohesion. We consider qualified applicants for employment for their anticipated contributions and without regard to race, color, religion, national origin, age, gender, gender identity or expression, sexual orientation, genetic information, medical condition, pregnancy, marital status, veteran status, or disability.