18. Describe in detail the specific duties and responsibilities assigned to this position. Attach additional sheets, if necessary, to properly describe the position.

This position reports to the University President and is responsible for planning and leading advancement initiatives to capitalize on the university’s success, engage a broad range of constituents and grow the endowment; lead and manage a staff in development and alumni relations, work closely with senior administrators and trustees to identify short and long-term priorities for fund raising, and manage a portfolio of major and principal gift prospects.

Provides overall leadership for all special project funding and special event programs for University enhancement. Prepares strategic plan with short and long-range goals to meet the University’s funding objectives. Coordinate, plan and directs activities designed to secure annual and special support from corporate and foundation sources.

Appoints, leads, evaluates, and manages University Relations staff. Establishes policies, systems, and procedures.

Prepares and administers department budget.

Develops and submits grant proposals for funds from private foundations, corporations, and government agencies. Identifies potential contributors to special project funds and ongoing operations through examination of past records, individual and corporate contracts, and knowledge of community.

Plans and coordinates fund drives for special projects. Assigns responsibilities for personal solicitation to members of staff, volunteer organizations and governing body according to special interests or capabilities.

Develops public relations materials to enhance institution image and promote fund raising programs.

Synthesizes complex or diverse information; Collects and researches data; Designs work flows and procedures.

Develops project plans; Coordinates projects; Communicates change’s and progress; Manages project team activities.

Develops workable implementation plans. Develops strategies to achieve organizational goals.

Informs subordinates of all relevant University Regulations and Internal Operating Procedures and provides access to all related documents; Assesses and documents subordinates’ ability to comply with all relevant University Regulations and Internal Operating Procedures; Employs measures of accountability for compliance with University Regulations and Internal Operating Procedures; Conducts and documents performance evaluations in a timely manner for each subordinate, in accordance with University Regulations and Internal Operating Procedures.
19. SUBORDINATES: List class codes, official class titles, and position numbers of each position that reports directly to this position.

19403 - Sr. Administrative Assistant
19402 - Program Assistant
20870/18976 - Director, Investments
20927 - Associate Vice President, Foundation

19401 - Computer Support Analyst
17351 - Executive Director
22704 - Director, Development

20. SUPERVISOR’S POSITION: Number: 16750 Class Code: 9200 Class Title: University President

21. WORKING HOURS:

a) Daily from 8:00 a.m. to 5:00 p.m. 

b) Total hours per week 40

c) Explain any variations in work week, split shifts, on-call status, or rotations.

Expected to complete all responsibilities regardless of the time needed to complete

22. MONETARY RESPONSIBILITY: Current budget for which this position is accountable. Include statement of responsibility for funds, amount and consequence of error.

The Vice President is in charge of a number of budgets and must be accountable at all times.

23. STATEMENT OF RESPONSIBILITY FOR CONFIDENTIAL DATA (The disclosure of which would be prejudicial to the successful operation of the University.)

The incumbent deals with sensitive issues and confidential information on a continuous basis.

24. KNOWLEDGE/SKILLS/ABILITIES:

The incumbent must possess the ability to embrace and communicate the University’s unique attributes and missing, breadth and depth of experience strengthening and leading a broad advancement program, success in cultivating and soliciting significant gifts, the ability to develop, mentor and lead a team of talented professionals, capital campaign experience, and the interpersonal skills to create and maintain effective relationships with a broad range of constituents.

25. REQUIRED LICENSES/CERTIFICATIONS/OTHER SPECIFIC REQUIREMENTS OF LAW:

Please review statements below check all that apply.

☐ This position requires a background check and/or fingerprinting.
☐ This position requires a childcare provider security check as required under Sections 402.305 and 402.3055, Florida Statutes.
☐ This position is responsible for meeting the requirements of Section 215.422, Florida Statutes, as amended regarding the approval and/or processing of vendors’ invoices and/or distribution of warrants to vendors.
☐ This position requires licensure, certification or other special requirements described below.

26. SIGNATURES: Incumbent: Carlos L. Welte Date: 9/24/08

Supervisor: James H. Ammons Date: 9/29/08

Reviewing Officer: James H. Ammons Date: 9/29/08
Carla S. Willis, CFRE

Objective
To lead a team-centered, high achieving institutional advancement office.

Professional experience
Florida A&M University, February, 2008 – Present, Vice President, University Relations and Executive Director, FAMU Foundation, Inc.

- Lead and manage the staff in the office of University Relations in identifying, engaging, cultivating, soliciting and stewarding a wide array of corporate, foundation, and individual donors and prospects
- Manage a portfolio of 50 - 100 major and principal gift level relationships
- Lead and manage the operations of the FAMU Foundation
- As a member of the President’s leadership team, represent the University at a wide array of local, regional and national university related events and activities


- Worked nationally with a wide array of institutional clients providing counsel in the areas of capital campaigns, principal, planned and major gift strategy, coaching and training of executive level (presidents, chancellors, etc.) staff, deans, development staff and board members in best practices in donor cultivation, principal, major and planned gift solicitation and stewardship

The University of Toledo, November, 2006 – February, 2008, Principal Gifts Officer

- Worked in concert with President, Vice President of Institutional Advancement, College of Law Dean, other University Deans and Administrators to engage, cultivate, solicit and steward a portfolio of 150 – 200 principal gift level donors and prospects.
- Work collaboratively with the College of Law alumni relations and University alumni relations staff on event opportunities that further the advancement agenda with College of Law and regional alumni prospects
- Represent the College of Law at university-wide alumni and regional events

Ohio Northern University, February, 2006 – November, 2006, Director of Development

- Worked in concert with Vice President of Advancement and College of Law Dean to plan and staff the first comprehensive, de-centralized development program for the College of Law
- Researched, identified, qualified, cultivated, solicited and stewarded a portfolio of approximately 250 principal and major gift prospects for the College of Law
- Developed and executed an annual fund plan for increased support of the College of Law
- Worked collaboratively with the College of Law alumni relations and University alumni relations staff on event opportunities that further the advancement agenda with College of Law alumni
- Represented the College of Law at university-wide alumni events

Regional Director, April, 2003 – January, 2006

- Identified, qualified, cultivated, solicited and stewarded a portfolio of approximately 250 leadership ($1M and above) and major gift ($100K - $999,999) donors for the Law School in the Eastern region
- Worked in concert with Law School dean, other regional directors and campaign steering committee volunteers to plan, launch and implement a $200 million capital campaign for the
Law School

- Secured several 7 and 6 figure gifts in support of the Law School’s capital campaign priorities
- Staffed Law School dean and campaign steering committee volunteers in cultivation and solicitation scenarios
- Worked collaboratively with other University of Michigan development colleagues on joint cultivation and solicitation strategies


- Developed, implemented and evaluated annual giving plans related to the Law School Fund, reunion campaigns, and class giving campaigns which resulted in $2.5M raised annually in unrestricted annual funds
- Recruited, managed and staffed Law School volunteer committees for aforementioned programs


- Served as principal consultant and project manager for a variety of small, medium and large non-profit clients in the areas of capital campaign planning and implementation, grant proposal writing, annual fund campaign planning and implementation, prospect research, prospect cultivation/solicitation, event planning and board training and development
- Managed a staff of 2 consultants and 1 part-time secretary


- Established a new, comprehensive development program; managed an assistant director of development; increased awareness of organization through print and electronic media; cultivated relationships with several corporations, businesses and foundations resulting in nineteen grant awards in an eighteen month period

**The University of Toledo, Toledo, OH, September, 1993 - January, 1997**

- Developed strategic plan for and directed a $1.4 million college campaign for University College; recruited, managed and staffed the capital campaign committee; identified, cultivated, solicited and stewarded a portfolio of major gift donors; managed one full-time support staff person and student employees

**The University of Missouri, Columbia, MO, September, 1991-April, 1993, Supervisor, Mizzou Annual Fund**

- Managed annual fund campaigns for all colleges and schools of the University; managed an annual corporate/business campaign to generate in-kind gifts to the University; managed a staff of sixty student employees and one full time support staff person; planned and managed an annual budget of $220,000

**Dictaphone Corporation, Kansas City, MO, 1990-1991, Sales Representative**

- Ranked in the top 25% of sales force; received national corporate award for negotiation and sales skills

**IBM Corporation, Kansas City, MO, 1981-1990, Marketing Support Specialist, Account Administrator, Senior Accounts Payable Specialist**

- Held a number of increasingly responsible positions in sales/customer support; received national “IBM Means Service” award and various other corporate awards for exemplary service and high achievement

**Additional professional and community**

- Selected as one of twenty participants in the Minority Advancement Institute of the Council for
centered activities

- Achieved Certified Fund Raising Executive (CFRE) status from the Association of Fundraising Professionals in 1998
- Received certificate for participation in John Brown Seminar on Planned Giving Techniques in 2003
- Former board member of the Arts Council of Greater Toledo, Toledo Botanical Gardens, Toledo YWCA, and Adopt America Network
- Former member of the Institutional Review Board for the Medical University of Ohio

Professional memberships

- Member, Association of Fundraising Professionals (AFP); served as President of the Northwest Ohio Chapter, and member of the AFP International Diversity Committee in 2002; served as President-elect in 2001, Program Committee Chair in 2000 and Treasurer in 1997 – 1998
- Member, Council for Advancement and Support of Education from 1992 to present; served as board member of CASE District V and Chair of the Committee on Equity for CASE District V from December, 2006 – February, 2008

Education

The University of Toledo, Toledo, OH 1995
- B.A., Interdisciplinary Studies with honors; G.P.A. 3.8/4.0

References provided upon request.