

ASPEN • LEADERSHIP • GROUP

DIRECTOR OF ADVANCEMENT SERVICES

ROLLINS COLLEGE

Winter Park, Florida

<http://rollins.edu>



The Aspen Leadership Group is proud to partner with Rollins College in the search for a director of advancement services.

The director of advancement services is a key position in the division of Institutional Advancement (IA), managing advancement systems, prospect research and tracking, and stewardship. The role provides leadership and technical expertise to ensure the fundraising success of the College. In addition to providing dynamic management for advancement operations, the director creates a vision for the future of the function at Rollins College. The director drives strategic utilization of data across IA to achieve ambitious fundraising and alumni engagement goals and to ensure efficient and effective management of work. The position reports directly to the vice president and is a member of the leadership team.

Founded in 1885 by New England Congregationalists who sought to bring their style of liberal arts education to the Florida frontier, Rollins is a four-year, coeducational institution and the first recognized college in Florida. Rollins College educates students for global citizenship and responsible leadership, empowering graduates to pursue meaningful lives and productive careers. Rollins is committed to the liberal arts ethos and guided by its values and ideals. Its guiding principles are excellence, innovation, and community.

Rollins is nationally recognized for its distinctive undergraduate and selected graduate programs. It provides opportunities to explore diverse intellectual, spiritual, and aesthetic traditions. It is dedicated to scholarship, academic achievement, creative accomplishment, cultural enrichment, social responsibility, and environmental stewardship. It values excellence in teaching and rigorous, transformative education in a healthy, responsive, and inclusive environment.

For more than 130 years, Rollins has adhered to the belief that college is about more than preparing for a career. It is about learning to think critically. It is about discovering how one individual can positively impact the world. To that end, Rollins strives to enable individuals to see the bigger picture, to understand how areas of knowledge are interrelated, and to view learning as a lifelong endeavor. As a result, its graduates are prepared to succeed in any career, but they are also prepared to pursue lives of meaning and purpose.

Rollins College has been ranked one of the top regional universities in the south in the annual rankings of "Best Colleges," released by *U.S. News & World Report*. For 22 consecutive years, Rollins has been ranked among the top two regional universities in the south and first in Florida. Rollins College was named the number one college in the south by *College Choice* in a ranking based on a nationwide survey of entering first-year students.

REPORTING RELATIONSHIPS

The director of advancement services will report to the vice president of institutional advancement.

PRINCIPAL OPPORTUNITIES

Rollins College, in the midst of a quiet phase of a campaign, is positioned for success in its fundraising, both annually and through the campaign. With the arrival of an experienced fundraising president two years ago, one who brings vision and clarity of purpose, Institutional Advancement is ramping up to systemically engage alumni and parents and embark on an ambitious campaign to fund an institutional strategic plan. The director of advancement services has an experienced team in Advancement Systems, Prospect Research and Tracking, and Stewardship as well as the partnership of colleagues who understand data, reporting, and the importance of both to the success of the program. Rollins is looking for a leader to imagine the future of Advancement Services in a shop that is fully integrated with Institutional Advancement and is seen as a valued partner in achieving the goals of the campaign and beyond.

PRIMARY RESPONSIBILITIES

The director of advancement services will

- provide strategic vision for information management and collaborate with IA colleagues to collect, manage, validate, expand, analyze, and interpret complex data to guide decision making and offer innovative solutions for critical advancement programs, in support of the College's comprehensive campaign and goals;
- lead a comprehensive prospect research and management team that builds the pool of identified prospective donors and works in close partnership with front line fundraisers;
- manage and leverage the full capabilities of the current Ellucian Banner Advancement system and its database and tools to support Advancement programs;
- ensure all new commitments are documented, recorded, and stewarded in accordance with gift agreements, industry best practices, and Rollins stewardship guidelines;
- develop an annual plan for the Advancement Services area that creates synergy among advancement systems, prospect development and stewardship teams to provide strategic support to all aspects of the front-line operation;
- keep abreast of tested and emerging technologies and methodologies that will more efficiently and effectively identify and manage prospects, help develop prospect strategy, and support data-driven decision making throughout IA;
- serve as an advocate and educator for advancement services systems and processes within IA, understanding and improving the experience of end-users, anticipating the needs of front-line fundraising and alumni engagement staff and effectively communicating with all constituencies;
- exhibit and encourage a strong customer service and solution-oriented work ethic among members of the AS team, continually seeking feedback from internal customers and external alumni, donors, and friends to adjust and improve operations to meet their needs;
- oversee the gift administration process, ensure timely, accurate, and appropriate administration of gifts and pledges;
- assume responsibility for all external reporting of fundraising results, through knowledge of CASE and VSE reporting guidelines, as well as UPMIFA endowment management policies and GAAP requirements;

- provide leadership, mentoring, and professional development to a team of professionals working in the fields of database management, reporting and gift processing, donor stewardship, special events, and constituent research and prospect tracking;
- provide financial management, and guidance for the operating budget assigned to AS; and
- manage special projects as assigned on a regular basis and perform related duties as assigned.

KEY COLLEAGUES



Laurie Houck

Vice President for Institutional Advancement

The vice president for institutional advancement oversees the Development, Corporate and Foundation Relations, Donor Relations, Annual Giving, Alumni Relations, Advancement Services and Scheduling and Events teams. Prior to Rollins College, Laurie Houck served as vice president for development and alumni relations at the College of Wooster. During that time, she and her team created and implemented effective fundraising and alumni engagement programs that led to increased giving and volunteer involvement, and built on the strong relationships with and commitment of the Board of Trustees and the Alumni Board. She also led the development team at Whitman College from 2006 to 2011, where she created the architecture for their largest campaign. Prior to Whitman, during her decade-long tenure at the University of Washington, she played a key role in the University's \$2 billion campaign.

Houck holds a B.A. in English from Whitman College and completed coursework at Harvard University's Institute for Educational Management in 2013. She joined the Rollins community in January 2017.



William (Bill) Short

Associate Vice President for Finance & Assistant Treasurer

Bill Short joined the College in September 2000 as director of accounting, responsible for oversight of financial statement preparation, compliance, internal control, debt financing, and accounts payable. Since that time, he has served as director of budgets and investments and assistant treasurer from 2005-2010. In this corporate officer role, Short was responsible for reporting to the College's Board of Trustees on matters of Investments, College Finance Operations and provided leadership and oversight to the College's endowment management, debt financing, and annual budgeting and control processes. In 2010, Short became the assistant vice president for finance and assistant treasurer and began oversight of all finance functions of the College. In 2014, he was promoted to associate vice president for finance and assistant treasurer.

Prior to Joining the College, Short was an audit manager for BDO Seidman, LLP, in Orlando, FL. He worked in public accounting for a total of 8 years, primarily in audit with a specialty in Not-for-Profits. He also worked in SEC reporting engagements, and tax consultancy and preparation (state and federal). Short holds a B.B.A in Accounting with a specialty in Accounting Information Systems from the University of North Florida (1992) and received his M.B.A. from Rollins College's Crummer School of Business in 2006 (Beta Gamma Sigma). Short calls Florida his home having moved to Sarasota in 1979. He has resided in the Orlando/Winter Park Area since 1998.



Pat Schoknecht
Chief Information Officer

Pat Schoknecht has been the chief information officer at Rollins College since 2009. In 2014, she added responsibilities as the assistant vice president for business services. Prior to arriving at Rollins, Schoknecht served as the director of information technology at Wagner College from 2005-2009 and was the founding director of the Center for Teaching, Learning & Technology at the University of Richmond from 2000-2005. Schoknecht began her professional career as a faculty member at Rutgers University after completing her Ph.D. at Cornell University and a USDA post-doc at the Children's Nutrition Research Center.

CANDIDATE QUALIFICATIONS AND QUALITIES

The successful candidate for the position of director of advancement services will have

- commitment to building a strong culture of philanthropy;
- strategic thinking and leadership skills;
- the ability to identify and capitalize on opportunities for leveraging people, processes, and data to increase the fundraising effectiveness of all IA teams;
- commitment to fostering and stewarding strong lifelong relationships between Rollins and its alumni, friends, and philanthropic partners at all levels;
- the ability to communicate effectively and build strong collaborative working relationships with colleagues in IA and others across the College;
- proven systems and technical experience in managing complex information systems and donor databases in multi-user, campus, and networked environments—includes superior knowledge of data management, report writing tools, data modeling, systems management and personal computer hardware and software support;
- knowledge of systems including Oracle, SQL, PL/SQA, Unix, structured programming, data modeling, and reporting tools like Argus—experience with Ellucian Banner Advancement a plus;
- strong project management, organizational and analytical skills and ability to set priorities and manage time effectively; and
- ability to handle confidential information and foster an environment of rigorous adherence to ethical best practices in all aspects of philanthropy.

A bachelor's degree is required for this position. An advanced degree in a related field is a plus. The successful candidate will have at least seven years of direct relevant experience, including database system management, programming systems and languages, prospect development or donor relations, and in a higher education or nonprofit environment; this will include experience managing teams and/or complex projects. Previous experience in a comprehensive campaign and/or database upgrade/migration is preferred.

SALARY & BENEFITS

Rollins College offers a competitive benefits package. As a Rollins College employee, one can take advantage of benefits and opportunities which will enhance the quality of one's life, provide protection for a variety of circumstances, help one prepare for your future, aid in personal and professional growth, and help maintain balance in one's work and family life.

LOCATION

This position is based in Winter Park, Florida, an attractive and historic residential community adjacent to the city of Orlando. Rollins' award-winning campus is situated on the shores of beautiful Lake Virginia and adjacent to the first-class dining, shopping, and entertainment options of Winter Park's famous Park Ave. Rollins College was ranked the No. 1 Most Beautiful Campus by The Princeton Review's *The Best 380 Colleges*.

DIVERSITY AND INCLUSION

Rollins' campus community is not only a reflection of the diversity of race, heritage and culture found in its backyard, but an extension of the good in the world that comes from respecting and celebrating differences.

APPLICATION DEADLINE

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please read them over for accuracy. Review of applications will begin immediately and continue until the successful candidate has been selected.

To nominate a candidate, please contact Susan Faraone, susanfaraone@aspenleadershipgroup.com.

All inquiries will be held in confidence.

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