



## ANNUAL GIVING & MEMBERSHIP MANAGER POSITION DESCRIPTION

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EFFECTIVE DATE:	<u>09/20/19</u>	FTE STATUS:	<u>1.0 (Full-time)</u>
DIVISION:	<u>Institutional Advancement</u>	FLSA CLASS:	<u>Exempt</u>
DEPARTMENT:	<u>Development</u>	SUPERVISES:	<u>2 FTE</u>
REPORTS TO:	<u>CEO</u>	DRIVING CLASS:	<u>Required</u>

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### GENERAL SUMMARY:

The Annual Giving and Membership Development Manager oversees the strategic development and implementation of America's Automotive Trust's (AAT) Annual Giving and Membership Program for the benefit of the Trust, LeMay – America's Car Museum and the RPM Foundation. The Manager also oversees the maintenance of the AAT database and supervises the CRM Database Coordinator and Membership Sales Representative and takes an active role in the cultivation and management of key relationships with all donors and members in support of AAT and its affiliates' Annual Giving and Membership Program.

This position requires the ability to utilize discretion to make decisions in support of the organization's objectives and departmental goals and the ability to work independently under minimal supervision with general instructions to fulfill the responsibilities described herein. Responsibilities include, but are not limited to: Developing, planning, executing, and evaluating a comprehensive full-cycle Annual Giving and Membership Program, including solicitation and retention strategies, budget creation, and revenue goals; Establishing, implementing, and overseeing annual membership promotion, recruitment, membership benefits, and an active calendar of membership events in coordination with the Signature Events Coordinator and activities, including designing, coordinating, and overseeing events, Member previews, Member's only initiatives, and Member socials; Overseeing all direct mail campaigns, including the Give the Gift of Membership Campaign; Overseeing the maintenance of the museum's customer relationship management (CRM) database, including cross-departmental membership and database training; Supervising the Donor Database Coordinator; Overseeing receipt and acknowledgement of gifts, managing membership fulfillment, and other actions related to the flow of funds for AAT and its affiliates; and, Other duties related to annual giving and membership growth for AAT and its affiliates.

This position description has been designed to indicate the general nature and level of work performed by jobholders within this role. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to the job. To perform the job successfully, an employee must perform each essential responsibility satisfactorily. These requirements are

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representative, but not all-inclusive, of the knowledge, skills, and abilities required for this position. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

## **PRIMARY OBJECTIVES:**

1. Develop, implement, and direct AAT membership strategy, specific programming, value added benefits, and an annual calendar of membership events in coordination with the Signature Events Coordinator to increase overall membership numbers, promote up-sales and top tier memberships, and promote regular member participation and donor advancement;
2. Provide support to the RPM and ACM Presidents, ensuring Foundation and Museum messaging and donor opportunities in the AAT Annual Giving Program, overseeing the execution of related gift receipts and acknowledgements, pledge reminders, donor record maintenance and pulling of data reports from Altru;
3. Grow AAT membership and donor base through cultivating and managing key relationships with all donors and members in concert with the CEO, Vice President for Institutional Advancement and Major Gift Development personnel;
4. Oversee the management of the Annual Giving and Membership budget, including revenue goal setting and review of both expenses and income to ensure that expenses are within budget and income meets or exceeds targets;
5. Oversee maintenance, upgrades, and use of the Museum's Altru CRM database to ensure data integrity, accuracy of data enrichment, data cleansing, and extraction of reports.

## **MAJOR RESPONSIBILITIES:**

1. Developing and implementing a comprehensive Annual Giving Program that focuses on new donors, donor retention, major gifts, and increasing donor annual gift amounts through the implementation of acknowledgement letters, pledge reminders, direct mail appeals, e-campaigns, annual fund appeals and the use of other cultivation and retention initiatives;
2. Developing and implementing a comprehensive Membership Program that focuses on new member recruitment, retention, and the upgrading of membership renewal levels through the implementation of active cultivation and retention initiatives and Membership Events;
3. Overseeing the creation, implementation, and monitoring of the Annual Giving & Membership budget including tracking income and expenditure, authorizing disbursements, financial analyses, preparing reports and overseeing the proper allocation of gifts and reconciling from Altru to Financial Edge;
4. Creating and implementing all membership processes, systems, and timelines for membership mailings and email communications including: membership acknowledgements, renewals, upgrades, invitations, general communications, developing and executing a plan for reciprocal member and employee programs that add benefit to AAT and affiliate memberships;
5. Supervising the CRM Database Coordinator and overseeing the establishment of policies, procedures, and best practices in the use of the museum's Altru CRM database system, including overseeing all related cross-departmental training;
6. Supervising the Membership Sales Representative and overseeing Membership sales and promotions at guest services/front desk;

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7. Providing support to RPM overseeing the execution of related gift receipt and acknowledgements, pledge reminders, donor record maintenance and pulling of data reports from Altru.

## **QUALIFICATIONS:**

The incumbent for this position must be at least 21 years of age and possess: a BA in Business Administration, Fundraising, Marketing, Communications or closely related degree with a minimum of two (2) years development, database, and/or event creation, and facilitation experience. Experience in sales and administrative coordination may be considered as a partial qualification. Work experience in a CRM system, such as Altru, is preferred. Education and relevant experience may substitute one for the other on a year for year ratings basis. The incumbent must be a team player able to work independently and collaboratively among all AAT and affiliates' departments.

### **Additionally, the incumbent must possess:**

1. The ability to pass an in-depth background investigation including criminal history, employment and education records and personal references;
2. A solid proficiency in the English language with professional abilities in oral and interpersonal communications. Bilingual abilities are preferred;
3. Intermediate to advanced skills in M.S. Word, Excel and Outlook;
4. An ability to thrive in a fast-paced, dynamic environment, with high expectations for professional outcomes;
5. A proven ability to multi-task and prioritize competing tasks while meeting deadlines;
6. A willingness to maintain scheduling flexibility for occasional evening and weekend work;
7. The skill and ability to work independently with general instruction and minimal supervision while maintaining a team oriented approach and attitude;
8. The skills and ability to positively and professionally function as part of a team environment and promote teamwork with a positive and solution-focused attitude;
9. The interpersonal skills, sensitivity, and ability to professionally interact with a diverse range of people of all ages, socio-economic groups and personality types;
10. The ability to work evening and weekend events as needed to fulfill the responsibilities of the position;
11. The ability to work on computer for extended periods of time; visually inspect compare and analyze written data; read and interpret instructional material; communicate clearly in both verbal and written forms; and lift and transport up to 25 lbs. periodically.

## **RESPONSIBILITIES:**

### **ANNUAL GIVING MANAGEMENT:**

1. Develops, reviews, and delivers Annual Giving policies and processes to support the effective identification, cultivation, solicitation and stewarding of annual gifts;
2. Creates and manages the Annual Giving budget, including revenue goal setting and review of both expenses and income;
3. Provides oversight of prospect research and the identification of potential major gifts and donors;
4. Cultivates relationships with major donors to grow the annual giving and membership program;

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5. Advises the RPM President in the development of the RPM Annual Giving Program and oversees related gift receipt and acknowledgements, pledge reminders and donor record maintenance;
6. Manages the “Give the Gift of Membership” campaign, as well as, other campaigns to obtain annual gifts, including the training and oversight of staff and volunteer callers;
7. Provides oversight to ensure the proper allocation and coding designation of received gifts;
8. Drafts donor acknowledgement letters, pledge reminders, and direct mail appeals to be sent by the CRM Database Coordinator;
9. Establishes, organizes, and develops direct mail solicitations, online giving and annual gift campaigns and acknowledgements of all donations;
10. Keeps up-to-date with trends, benchmarking, best practice, professional standards, regulations and new concepts and ideas within the field of annual giving.

#### **MEMBERSHIP MANAGEMENT:**

1. Drafts and administers the Annual Giving & Membership budget including, revenue goal setting, reporting, and review of both expenses and income;
2. Collaborates with other AAT and affiliate departments to develop and establish a “Club Affiliate” membership program focused on local enthusiast clubs which includes an active program of outreach to promote membership;
3. Provides training to staff regarding membership promotions and membership sales techniques;
4. Manages membership fulfillment and oversees receipt of membership gifts for tax purposes;
5. Drafts all membership materials, including thank you letters, renewals, web content, emails, e-blasts, appeals and special marketing materials and collaborates with the Marketing & Communications Department for final creative design;
6. Oversees the maintenance and updating of membership records in Altru;
7. Oversees the process for monthly member renewals and lapsed member retrieval efforts;
8. Creates and implements a series of annual direct mail campaigns and online appeals for membership acquisition and upgrades, including the “Give the Gift of Membership” campaigns;
9. Orders and maintains supplies for membership fulfillment, including: membership gifts, membership card supplies, letterhead, envelopes, and card holders;
10. Coordinates the production and design of all membership materials, in collaboration with the Marketing & Communications Department, for events and marketing needs;
11. Organizes and conducts phone campaigns to obtain membership renewals, including the training and oversight of staff and volunteer callers;
12. Cultivates relationships with local and regional museums and institutions to promote reciprocal member and employee programs.

#### **MEMBERSHIP EVENTS:**

1. Supervises the Museum’s efforts to promote and increase membership sales onsite, online; as well as through community outreach and special events, including Member previews, Member’s only initiatives, and Member socials;

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2. Provides for and follows up on member invitations to special events;
3. Reviews prospect lists with CEO to extend targeted invitations to prospects for special events and trips;
4. Manages post-event communication to prospects including provision of AAT, ACM, RPM Foundation;

**DATABASE MANAGEMENT:**

1. Supervises the CRM Database Coordinator and all related duties;
2. Oversees the management and maintenance of the museum's CRM database, including overseeing upgrades and related cross-departmental training;
3. Oversees the entry and maintenance of donor records and pulling of related data reports from Altru;
4. Oversees proper allocation of gifts and memberships including the development and communication of related procedures and training;
5. Works with Finance to ensure proper expenditure of budgeted funds;
6. Ensures the provision of adequate training for all AAT and affiliate end users in the use of the Altru CRM system and related data management processes and protocols.

**OTHER:**

1. Provides support to the CEO for projects, as requested, for Advancement purposes;
2. Supervises volunteers and interns as needed;
3. Communicates in a friendly, professional and helpful manner with all employees, board members, guests and external contacts;
4. Ensures a professional, high quality and customer focused service is applied throughout all activities;
5. Maintains a positive attitude that is solution and team focused;
6. Utilizes MS-Word and Excel to generate communications and reports;
7. Utilizes MS-Outlook for email communications and scheduling;
8. Maintains the flexibility to accommodate occasional evening and weekend work, as needed;
9. Participates in continuing educational opportunities for professional growth and development;
10. Performs additional duties and supportive tasks as assigned or needed.

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