

CRYSTAL • Receive and deposit checks/cash. • Process donations and revenue, inputting into RE and posting to FE. • Get mail/pass it out accordingly. • Add and update donor information in RE. • Order office supplies. • Manage event registrations and answer questions related. • Send off invoices that need to be paid by University for Advancement team. • Craft and mail out acknowledgements. • Enter and manage pledges and send out reminders. • giving@montevallo.edu and advancementoffice@montevallo.edu manager • Ensure paper files are in order related to planned gifts, estate gifts, property files, etc. • Traffic cop of any general inquiries • Manages credit card swiper utilization/check-in and check-out process. • Matching gifts • Creates and distributes annual tax letters. • Oversee any student workers and assign them projects.	MINEA • Enter ERFs and invoices into FE for payment. • Manage any questions related to ERFs. • Cut checks and distribute as appropriate. • Void checks when needed. • Answer questions about Foundation account balances, pulls financial reports • Add and update vendor and project information in FE. • Approve gift batches in FE. • Scan bank statements and put them in R drive. • Manages Foundation credit card utilization/check-in and check-out process. • Scan payables and put them in FE. • Positive Pay • apfoundation@montevallo.edu manager • Reconcile bank statements
EMILY • Create and implement annual campaigns (Falcon Victory, Founders' Day, Giving Tuesday, end of year, and Days of Giving/Homecoming effort) • Trellis manager • Give Campus manager. • Support for fundraising from groups across campus (Art Auction, alumni, athletics, Outdoor Scholars, school, and group efforts) • Staff/Faculty giving manager. • Friendsgiving event/holiday thank yous of staff/faculty. • Scholarship impact reports • Scholarship database	KAMERON • Meet with and secure gifts from donors (\$25K - \$200K cumulatively) • Former staff and faculty donors • Scholarship luncheon • Facebook page manager • Webpage manager • Freewill manager • Signage projects across campus related to philanthropy/donors. • Annual report for Foundation • Quarterly donor newsletter
SCARLET • Foundation Board • Set up online forms (java script) for various events in Online Express • Set up new accounts in RE and FE • Approve ERFs • Check signer • Oversee accounting and audit work. • Investments liaison/main contact with banks • Approve scholarship authorization forms/manage scholarships overall • Night of Distinction • Overall stewardship/donor recognition plan • Grants/Corporate Funders/Falcon Friends • Positive Pay backup • Supervise Crystal, Minea, Kameron and Emily	SCOTT • University President/Cabinet/Board of Trustees • Government Relations • \$250K cumulative donors and up • Major gifts • Estate gifts • Supervise Scarlet/overall Advancement office (Foundation, alumni, MarCom) • Check signer • Community partners overseer

**Capital campaigns will involve all staff*