

**POSITION TITLE:**

Associate Vice President of Advancement Systems & Enablement

BASIC FUNCTION:

The Associate Vice President of Advancement Systems & Enablement is a full-time leadership position responsible for ensuring the Foundation's people, processes, data, and technology platforms are aligned to advance the organization's mission and objectives. This role combines both strategic and tactical responsibilities, serving as the steward of the Foundation's advancement systems while fostering organizational adoption, proficiency, and effective utilization of technology and data.

The Associate Vice President serves as the operational owner of the systems and tools that support fundraising, donor engagement, scholarship and grant administration, program delivery, and related organizational functions. The position is responsible for data governance, data integrity, system optimization, and the management of cross-organizational data relationships and workflows. Working closely with executive leadership, the role helps evaluate, recommend, and implement technology solutions that enhance organizational effectiveness, improve decision-making, and support strategic priorities.

Operating within a shared-services technology environment, the Foundation manages complex fundraising, financial reporting, donor stewardship, scholarship, grantmaking, and programmatic activities. This position serves as the Foundation's primary liaison for these technology relationships excluding selected systems that rest with the finance team, ensuring systems integration, data security, information accessibility, and operational continuity. The Associate Vice President also provides reporting, analytics, and organizational intelligence that enable data-informed decisions while helping staff and volunteers leverage available tools to maximize performance and mission impact.

RESPONSIBILITIES:*Data Architecture & Systems Strategy (20%)*

- Serves as the strategic architect and administrator of the Foundation's advancement technology infrastructure.
- Develops, documents, and implements policies, procedures, and standards governing data management, security, accessibility, and system utilization.
- Acts as the primary owner, administrator, and subject matter expert for Raiser's Edge and related advancement systems.
- Evaluates emerging technologies, artificial intelligence tools, automation platforms, and predictive analytics solutions that improve organizational effectiveness, fundraising performance, and operational efficiency.
- Oversees system configuration, optimization, upgrades, integrations, and ongoing maintenance to ensure operational effectiveness.
- Manages the Foundation's broader data ecosystem, ensuring systems function cohesively to support fundraising, communication, stewardship, scholarship, grantmaking, finance, and operational needs.
- Leads integration efforts and manages relationship between Foundation-managed platforms and external systems, including Salesforce, event management platforms, online giving tools, payment processors, marketing automation systems, and other third-party applications, including contract oversight, performance evaluation, and strategic planning.
- Develops and maintains system documentation, data dictionaries, reports, queries, workflow maps, and governance standards.
- Collaborates with internal and external stakeholders to ensure systems align with organizational priorities and strategic objectives.

Data Integrity, Governance & Operations (40%)

- Oversees the day-to-day integrity, accuracy, completeness, and reliability of the Foundation's constituent and donor database.
- Establishes and monitors data quality standards and key performance indicators related to database health.

- Leads ongoing data audits, cleanup initiatives, deduplication efforts, and corrective actions to maintain accurate records.
- Develops and implements data governance practices that ensure consistency across departments and platforms.
- Creates and enforces procedures for data entry, constituent management, coding structures, campaign tracking, and record maintenance.
- Collaborates with Finance team to establish and maintain gift processing workflows, policies, and controls that support accurate financial and donor records.
- Serves as the primary resource for troubleshooting data-related issues and resolving system discrepancies.
- Oversees data imports, exports, migrations, and conversion projects while ensuring data accuracy and integrity.
- Partners with advancement, finance, and program staff to ensure accurate reconciliation and reporting of philanthropic activity.
- Develops and manages the annual technology and advancement operations budget, including software licensing, vendor contracts, consulting services, and future technology investments.
- Leads and maintains the Foundation's digital giving infrastructure, including online donation forms, campaign-specific giving pages, event registration platforms, and payment processing integrations, ensuring an exceptional donor experience, accurate data capture, and seamless integration with the Foundation's advancement systems.
- Maintains appropriate data security controls, user permissions, and access protocols.
- Supports compliance with applicable privacy regulations, donor confidentiality requirements, and organizational policies.
- Develops and manages disaster recovery and data continuity procedures for advancement systems.
- Develops and manages the annual technology and advancement operations budget, including software licensing, vendor contracts, consulting services, and future technology investments.

Data Analysis, Reporting & Business Intelligence (25%)

- Produces timely, accurate, and actionable queries, reports, dashboards, and analytics to support organizational decision-making.
- Develops standard and custom reporting tools for fundraising, donor engagement, stewardship, scholarships, grants, and operational performance.
- Assists leadership in analyzing data trends, identifying opportunities, and evaluating progress toward strategic goals and key performance indicators.
- Creates prospecting, pipeline, campaign, participation, retention, and performance reports that inform fundraising strategy.
- Supports board, committee, executive, and management reporting needs.
- Identifies patterns and insights within constituent and donor data to improve engagement, retention, and fundraising outcomes.
- Collaborates with staff to define reporting requirements and translate business needs into meaningful analytical outputs.
- Maintains data visualization tools and dashboards that provide real-time access to critical performance metrics.

Advancement Enablement, Training & User Support (15%)

- Serves as the primary trainer, coach, and internal consultant for advancement/Foundation systems, tools, and technology platforms.
- Leads onboarding and ongoing training for new staff on database procedures, reporting tools, workflows, and technology resources.
- Develops training materials, user guides, reference documentation, and best practices for system utilization.
- Empowers fundraising staff to focus on donor cultivation, solicitation, stewardship, and relationship management by ensuring systems effectively support their work.
- Enables programmatic staff to focus on delivering mission impact through efficient and user-friendly technology solutions.
- Provides proactive support and troubleshooting to staff utilizing advancement systems and related technologies.
- Monitors advancements in fundraising technology, constituent relationship management systems, business intelligence tools, and related platforms. Proactively assesses new features and updates, communicates their

relevance to staff, and provides training and guidance that enables teams to leverage technology more effectively in support of fundraising, stewardship, program delivery, and organizational goals.

- Identifies opportunities to streamline workflows, reduce administrative burden, and increase organizational efficiency.
- Promotes adoption of technology solutions and fosters a culture of data-informed decision making across the organization.
- Collaborates with leadership to identify future system and reporting needs that support organizational growth and advancement objectives.
- Stays current on industry trends, best practices, and emerging technologies related to fundraising operations, constituent relationship management, and business intelligence.

INTERNAL RELATIONSHIPS:

Reports to the Chief Advancement Officer. Works closely with the Chief Financial Officer, Senior Director of Technology and Finance Administrator, as well as with all Foundation and Fraternity staff.

EXTERNAL RELATIONSHIPS:

Has regular contact with the public, vendors, donors, alumni, undergraduates, and friends of Phi Kappa Psi as appropriate.

QUALIFICATIONS and QUALITIES:

- Bachelor's degree required.
- Minimum of seven (7) years of progressively responsible experience in database administration, data governance, advancement operations, CRM management, or related technology leadership roles.
- Demonstrated expertise in constituent relationship management (CRM) systems within a nonprofit or philanthropic environment, preferably including Blackbaud Raiser's Edge NXT and Salesforce.
- Proven experience leading system implementations, conversions, integrations, upgrades, and user adoption initiatives.
- Strong understanding of data architecture, database management, data governance, and data quality best practices.
- Demonstrated ability to design, document, implement, and continuously improve scalable processes and systems.
- Experience managing and integrating multiple technology platforms to support fundraising, stewardship, marketing, finance, and program operations.
- Strong analytical skills with the ability to transform complex data into actionable insights, reports, dashboards, and recommendations.
- Exceptional communication and interpersonal skills, including the ability to translate technical concepts into practical guidance for non-technical audiences.
- Proven ability to train, coach, and support staff in the effective use of technology and data-driven processes.
- Demonstrated ability to work collaboratively across departments and build productive relationships with staff, volunteers, consultants, and vendors.
- Strong project management, organizational, and prioritization skills with the ability to manage multiple initiatives and deadlines simultaneously.
- High degree of accuracy, attention to detail, and commitment to data integrity and operational excellence.
- Ability to identify issues, evaluate alternatives, and implement effective solutions in a timely and thoughtful manner.
- Self-motivated and able to work independently while contributing effectively as a member of a collaborative team.
- Adaptable and comfortable working in a dynamic environment with evolving priorities and technologies.
- Understanding of fundraising operations, donor stewardship, gift processing, and advancement services practices preferred.
- Broad knowledge of nonprofit fundraising principles, donor lifecycle management, and constituent engagement strategies preferred.
- Demonstrated professionalism, sound judgment, discretion, and commitment to maintaining confidentiality.
- Willingness and ability to travel and work occasional evenings and weekends as required.

Preferred Characteristics

- Intellectual curiosity and a commitment to continuous learning.

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Ready for Life

- Strong customer-service orientation and desire to help others succeed.
- Creative and proactive approach to solving problems and improving processes.
- Positive attitude, collaborative spirit, and ability to foster adoption of new technologies and ways of working.
- Sense of humor and enthusiasm for advancing the organization's mission.

OTHER DUTIES:

The above statements are intended to describe the general nature and level of work being performed in this position. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

NON-DISCRIMINATION POLICY:

We are an equal opportunity employer and do not discriminate in hiring or employment on the basis of race, color, religion, national origin, gender, marital status, sexual orientation, age, disability, veteran status, or any other characteristic protected by federal, state, or local law.