# PEA Job Description

## 1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>992149</th>
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<tbody>
<tr>
<td>Position Title:</td>
<td>Annual Giving Officer, Appeals and Special Projects</td>
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<tr>
<td>Department:</td>
<td>Annual Giving</td>
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<tr>
<td>Reports to:</td>
<td>Manager, Annual Giving</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct <em><strong>0</strong></em> Indirect <em><strong>1</strong></em></td>
</tr>
<tr>
<td>Classification Level</td>
<td>SG 11</td>
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<tr>
<td>Last Updated</td>
<td>February 2018</td>
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## 2. Position Summary

The Annual Giving Office conducts fundraising programs for the faculties and units, and directs university-wide appeals for gifts under $25,000. The Annual Giving team reaches out to alumni, donors, employees, and friends of the university to promote the scholarships, bursaries, and initiatives that support our current and future students, and better our community.

Working directly with the Manager, Annual Giving, Alumni and Annual Giving Officers, Development Officers, Deans, Directors, Department Chairs and other members of the fundraising team, the Officer develops and oversees the execution of direct mail and email campaigns that build and increase annual support of the University from all constituent groups. The Officer consults with Deans and Faculty-based fundraising staff to develop the most appropriate strategy, case for support, and multi-channel approach for appeals.

The Officer is responsible for assisting in the implementation of other Annual Giving fundraising projects, including annual giving days, monthly giving circles, class giving, parent giving and other duties as assigned.

The Annual Giving Officer, Appeals and Special Projects will also oversee the communication and marketing aspects of the Annual Giving Office in coordination with Alumni and Development Communications plans (i.e. Alumni Relations, Donor Relations).

In managing this portfolio, the Officer conducts external research into best practices for direct mail, e-solicitation and other methods of broad-spectrum appeals. The incumbent consults with local counterparts and leaders in this field, observes ethical fundraising practices, and performs thorough analysis to independently develop effective solicitation lists.

## 3. Key Responsibilities and Expectations

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<th>Key Responsibilities</th>
<th>Expectations:</th>
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<td>% of time</td>
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<tr>
<td>Direct mail and multi-channel fundraising program 50%</td>
<td>• Develops strategy and leads the operational execution of all direct mail and email campaigns to conduct highly specialized solicitation campaigns, managing projects from conception through completion.</td>
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- Consults with Faculty-based fundraising staff and Deans to develop the most appropriate strategy, case for support, and multi-channel approach for appeals.
- Raises a minimum of $80,000 annually and acquires 750 new donors in first year to support UVic strategic priorities through a multi-channel direct response fundraising program (direct mail, email, telemarketing, stewardship).
- Writes and edits direct mail and email pieces, as well as directs the segmentation and creation of mailing lists.
- Facilitates the flow of communication between faculties/departments, the Alumni and Development team, and internal departments (marketing, distribution services, printing and duplicating).
- Creates and implements an annual work plan for the direct mail and multi-channel giving program including stewardship pieces.
- Develops, implements, and supports program evaluation and review.
- Develops and maintains an annual budget for the direct mail and email giving program.
- Manages one work study student assistant.
- Executes a minimum 15 Faculty/department specific appeals and 5 university-wide appeals per year.

**Special Fundraising Projects 35%**
- Develops strategy and implements other Annual Giving fundraising projects, such as annual giving days, parent giving, and other broad audience appeal strategies that increase donor participation.
- Designs and executes a customized, individualized Monthly Giving Program to increase donor participation.
- Creates transformational strategies and data-informed metrics to upgrade donors in a yearly campaign.

**Annual Giving Communications & Marketing 15%**
- Develops a branded and consistent annual giving messaging to be used in fundraising material for external audiences (including alumni, faculty, staff, retirees, parents, students, and community members).
- Develops content on the Alumni and Development website that is current, engaging and professional in appearance, with relevant and easily accessible information to donors.
- Writes and edits content for all Annual Giving print and electronic publications and materials, including annual appeals, thank you letters, stewardship pieces, pledge packages, solicitation pieces, and invitations.
- Creates new and exclusive content to be communicated online through the Annual Giving website.
- Oversees and maintains Annual Giving pages on the University of Victoria website in conjunction with the Annual Giving Coordinator.
- Serves as primary liaison with University Communications + Marketing ensuring effective coordination and maintenance of brand standards.
- Works collaboratively with other Communications staff in Alumni and Development and Faculties.
4. Classification Factors:

**Problem-Solving:**
Project management of multiple concurrent appeals, with varied methodologies, such as face-to-face solicitations, direct mail, email solicitations, requires the Officer to work closely with other university constituents, e.g., Deans, Department Chairs, Faculty members, Development Officers, Prospect Researchers, Alumni Relations Staff and other staff within external relations and the faculties. The Special Projects and Appeals Officer requires expert management skills to lead concurrent projects and multiple demands from a very diverse set of duties in a fast-paced and busy office. The Officer must have good judgment, discretion and tact in dealing with a vast variety of people and the ability to adapt quickly to changing requirements is imperative. Creativity, tact and good judgment are essential qualities for this position. The Officer is expected to address challenges autonomously. Advice and consultation is readily available, but the Officer is expected to problem solve in a timely manner.

**Responsibility for Financial & Material resources:**
The Appeals and Special Project Officer is responsible for monitoring and maintaining accounts within a moderate budget for communication materials, as well as moderate purchases. In consultation with the Manager, Annual Giving, the Officer be responsible for purchasing and spending activity (printing material, marketing, etc.) within the confines of project-based budget of up to $50,000, with multiple projects per year. Expenditures greater than $5,000 are on approval of the Manager, Annual Giving.

The Officer is also responsible for the appropriate use of university data records, which include over 100,000 alumni and donor records.

The Officer is responsible for raising a minimum of $80,000, with a focus on acquiring and upgrading donors. The value of an acquired donor has a great long term financial benefit for the university.

**Responsibility for Human Resources:**
This position hires, trains, and provides guidance in work for one or more part-time work-study students who provide administrative support for the Annual Giving Office from September to April. The Officer will have functional oversight of the Annual Giving Coordinator on a project basis (i.e. website development, appeal materials, data manipulation). This position may also provide guidance and direction to other staff and students as required in the execution of related programs.

**Impact of Decisions and Actions:**
Decisions and strategies made by the Appeals and Special Projects Officer impact the University’s relationships with alumni and donors through various fundraising activities. These activities are central to the mission of the Annual Giving and Alumni Relations unit. Success or failure in this position will have an impact on the extent of alumni participation and donor engagement and success of the overall program. Errors or omissions can impact the reputation of the institution and have negative consequences for future philanthropic involvement.

The fundraising strategy developed by the Officer will directly influence the number of donors and amount raised for the University, which impacts program funding and scholarship and bursary availability. The Officer is also responsible for ensuring content on the Alumni and Development website is current, engaging and professional in appearance, with relevant and easily accessible information for donors.

**Independence:**
Working with Faculty-based fundraising staff and Deans, the Officer will take a lead role in determining the most appropriate strategy, case for support and multi-channel approach for appeals.
The Officer works independently with management-level staff and faculty across campus. Uses discretion and independence in dealing with sensitive personal and donor information. Advice and support is available, but independent decision-making is expected from the Officer in order to develop and implement projects and priorities in a timely manner.

The Officer works within the national standards of ethical fundraising (Association of Fundraising Professionals [AFP] and Canadian Association of Gift Planners [CAGP]), Canada Revenue Agency and university policies and/or department procedures (i.e. the Gift Acceptance, Project Approval, Prospect Clearance, and Recognition & Naming Policies), and within the larger strategic plan of the university.

5. Summary of qualifications:

This position requires a Bachelor’s degree plus three years of experience in a development, marketing, or communications position.

An equivalent combination of education and experience may be considered.

Knowledge requirements include:
- Knowledge and awareness of fundraising best practices and trends.
- Knowledge and awareness of direct mail, e-appeals, and peer-to-peer fundraising best practices and trends.
- Project management best practices.
- Social Media platforms, their respective participants (Facebook, Twitter, Snapchat, LinkedIn, YouTube, Instagram, Pinterest etc.) and how each platform can be optimally deployed in different scenarios for fundraising purposes.

In addition this position requires:
- Proven track record of success in developing and implementing multi-channel fundraising appeals.
- Experience writing successful and impactful fundraising appeals, case statements and promotional materials.
- Excellent leadership, interpersonal, organizational, and motivational skills are essential.
- Excellent time management skills and ability to juggle many projects at once.
- Superior communication skills, both written and verbal.
- Ability to build and maintain productive working relationships with all stakeholders.
- Ability to work independently and collaboratively in a team environment.
- Proven track record achieving project goals on time and produce deliverables of a high quality.
- Ability to work effectively with a diverse population and with all levels of university personnel.
- A self-starter - creative team player who takes initiative and has the ability to work collegially with a broad spectrum of personalities.

Assets or Preferences:
- A strong working knowledge of the policies and procedures of the University, Development Office, Alumni Relations, Advancement Services, and the respective Faculties and Units
- University of Victoria alumni experience or background
- Familiarity with Raiser’s Edge
- Familiarity using Social Media to accomplish business objectives
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<th>Employee’s Signature:</th>
<th>Date:</th>
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<tbody>
<tr>
<td>Manager’s/Supervisor’s Signature</td>
<td>Date:</td>
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