PEA Job Description

1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>994311</th>
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<tbody>
<tr>
<td>Position Title</td>
<td>Annual Giving Officer</td>
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<tr>
<td>Department</td>
<td>Alumni Relations</td>
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<td>Reports to</td>
<td>Manager, Annual Giving</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct___0___</td>
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<td>Classification Level</td>
<td>SG 11</td>
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<td>Last Updated</td>
<td>March 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.

Reporting to the Manager, Annual Giving, the Annual Giving Officer is responsible for strategically planning, executing, and evaluating the UVic Annual Leadership Giving program. The Officer is also responsible for assisting in the implementation of other Annual Giving fundraising programs, including the direct mail/special appeal program, individual giving, and other duties as assigned. Working directly with the Manager of Annual Giving, with Deans, Department Chairs, Directors, and other members of the fundraising team, the Officer plans and implements initiatives that will build and increase annual support of the University from all constituent groups, including the Faculty and Staff Campaign. The Officer is responsible for raising $250,000 annually to support UVic strategic priorities.

Position manages a large personal portfolio of donor prospects with the goal of identifying, qualifying, cultivating, soliciting and stewarding leadership gift ($1,000-$24,999) prospects, as well as identifying and qualifying a pipeline of major gift (≥$25,000) and planned giving prospects. In managing their portfolio, the Officer conducts external research into best practices for leadership giving, consults with local counterparts and leaders in this field, observes ethical fundraising practices, and performs thorough data mining and analysis to independently develop a prospect portfolio. The Officer also develops and executes a leadership giving campaign plan to upgrade current and past leadership level donors, and acquire new $1,000-$24,999 donors primarily through independent personal contact, targeted appeals, and strategic segmentation.

3. Key Responsibilities and Expectations

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<th>Key Responsibilities</th>
<th>Expectations:</th>
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<td>Leadership Giving</td>
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<td>Prospect Management</td>
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<td>• Raises a minimum of $250,000 annually to support UVic strategic priorities.</td>
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<td>• Engages, cultivates, and solicits a portfolio of approximately 800 autonomously identified potential or</td>
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• Advises Development Officers and Planned Giving Officers of major gift donors and planned giving prospects.
• Researches, develops and implements leadership giving strategies for renewing existing $1,000 -$24,999 annual gift donors, recovering past $1,000 -$24,999 annual gift donors, and acquiring new $1,000 -$24,999 annual gift donors.
• Personally visits over 100 donors each year to solicit them for their annual gift.
• Identifies, recruits, and supports appropriate individual stakeholders (such as Deans, Directors, Chairs, and Faculty) to develop relationships with prospects and continues to build on existing relationships with donors.
• Plans coordinated cultivation, solicitation, and stewardship strategies for top donors in conjunction with Directors, and in consultation with Deans, Department Chairs, and key faculty members as necessary.
• Initiates, plans, and segments annual leadership giving direct mail appeals (i.e. writing letters, telephone scripts, designing pledge card/form templates and collateral materials), to ensure all prospects within the leadership giving portfolio are touched with a solicitation.
• Identifies, traces, and researches prospects with potential capacity and interest, as identified through Prospect Research, the Annual Giving Tracing Program, news articles, online charitable databases, internet searches, and data mining.
• Oversees the Annual Leadership Giving aspect of the Annual Giving Student Calling Program, and provides training and guidance to Annual Giving Student Callers calling leadership giving prospects.
• Plans meaningful engagement opportunities on and off campus (ex. events, tours) for cultivating prospect relationships with UVic.
• Researches and prepares in-depth briefing notes for Deans, Department Chairs, Faculty Members, Directors, and other members of the fundraising team for high-level donor visits.

Special Appeals/Direct Mail/Faculty & Staff Campaign 20%
• Plans and implements specified group giving campaigns from conception through completion, including project managing and coordinating with UVic staff, analyzing and segmenting donor pool, creating data pull report, writing direct mail letter(s) and supporting documentation, editing pledge form, coordinating printing, signing, and mailing of letters, and tabulating and reporting results.
• Works with Manager, Annual Giving to oversee the planning, strategy, and implementation of the UVic Faculty and Staff Campaign.
• In collaboration with alumni, donors, prospects, and faculty or unit-based staff (Deans, Department Chairs, and Directors of Research Centres), drafts high-level personalized direct mail letters for specific prospects.
• Advises alumni, donors, prospects, and faculty or unit-based staff (Deans, Department Chairs, and Directors of Research Centres) on fundraising strategies and approaches for face-to-face to face cultivation and solicitations meetings.
Leadership Giving Program Communications & Marketing 10%

- Communicates critical timelines, goals, and appeal strategies to internal UVic stakeholders.
- Engages external stakeholders to ensure a sustainable and transparent program (i.e. engage with UVic Alumni Association Board Members and UVic Retirees Association Members).
- Forges relationships with campus leaders, departments, faculties, and units on campus to provide more meaningful engagement opportunities for leadership giving donors.
- Develops innovative communication and marketing materials for internal and external audiences (including alumni, faculty, staff, retirees, parents, students, and community members).
- Creates new and exclusive content, including media, to be communicated online through the Annual Giving website.

Administration, Evaluation and Analysis 5%

- Develops and implements an annual work plan for the annual leadership giving program.
- Develops, implements, and supports program evaluation and review.
- Maintains a donor-centered approach to clearance, in collaboration with Directors, Development Officers, and faculty leadership to coordinate solicitation and recruitment strategies for key prospects.
- Develops and maintains an annual budget for the annual leadership giving program.
- Manages two work study student assistants

4. Classification Factors:

Problem-Solving:
- Requires skillful management to coordinate concurrent events and multiple demands from this very diverse set of duties in a fast-paced and busy office.
- Must have good judgment, discretion and tact in dealing with a vast variety of people.
- Ability to adapt quickly to changing requirements is imperative.
- Executing the solicitation strategy involves coordinating multiple 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.

Creativity, tact and good judgment are essential qualities for this position. Advice and consultation is readily available, but the Officer is expected to problem solve in a timely manner.

Responsibility for Financial & Material resources:
- Appropriate use of university data records.
- Annual gift goals goal is in the range a minimum of $250,000. Gift amounts are normally below that of a major gift; asks for donations and orchestrates the transaction.
- Responsible for monitoring and maintaining accounts within a small budget for travel and expenses as well as moderate purchases.

Responsibility for Human Resources:
- Works under direction from the Director of Alumni Relations and the Manager, Annual Giving. The Director manages the performance and the Manager contributes feedback and participates in performance management. Works with Deans, Unit Heads regularly as needed.
- The Officer is responsible for recruiting, hiring, training, mentoring, and evaluating two work study students. These students report directly to the Officer. In addition, the Officer
provides special training, mentoring, and monitoring of 2-3 student callers. These callers are responsible for soliciting selected prospects in the Officer's portfolio.

Impact of Decisions and Actions:
- Responsible for ensuring content on Development website is current, engaging and professional in appearance, with relevant and easily accessible information to donors.
- Accountable to the donor for proper stewardship of donations.
- Decisions and plans made by the Annual Giving Officers impact the University’s relationships with Alumni and Donors.
- The Officer creates a long term investment in donors who may have the ability to make a major gift in the future. The Officer's success will directly impact the success of the Alumni and Development unit. Errors or omissions can impact the reputation of the institution and have negative consequences for future philanthropic involvement.

Independence:
- Works within 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.
- 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.
- Works with allied professionals to write and edit briefing notes, proposals, research documents and other communication pieces.
- Works independently with donors and key alumni. Uses discretion and independence in dealing with sensitive personal and donor information.

5. Summary of qualifications:

This position requires a Bachelor's degree plus three years of experience in a front line fundraising 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 setting and implementing strategic fundraising plans for individual prospects.
- Knowledge of volunteer engagement best practices in peer-to-peer solicitations.

In addition this position requires:
- Proven track record of identifying, cultivating, soliciting and closing gifts of $1,000+ range.
- 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, including the ability to write and speak clearly and effectively, and to listen, and the capacity to engage, inspire, and persuade.
- Ability to build and maintain productive working relationships with all stakeholders.
- Ability to work independently and collaboratively in a team environment.
- Ability to engage faculty, staff, and volunteers in donor visits and to earn and maintain their confidence.
- 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.
• Proficiency with database, spreadsheet, and word processing applications (e.g. Microsoft Word, Excel)

Assets or Preferences
• Experience working in higher education institution.
• 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.

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