# PEA Job Description

## 1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>992738, 992856, 993053, 993054, 994114, 998667</th>
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<tbody>
<tr>
<td>Position Title</td>
<td>Alumni Annual Giving Officer</td>
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<tr>
<td>Department</td>
<td>Alumni Relations, Div. of External Relations</td>
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<tr>
<td>Reports to</td>
<td>Director, Alumni Relations and Dean/Assistant</td>
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<td></td>
<td>Dean/Unit Head/Manager, as assigned</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct 0  Indirect 0</td>
</tr>
<tr>
<td>Classification Level</td>
<td>SG11</td>
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<tr>
<td>Last Updated</td>
<td>March 2018</td>
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## 2. Position Summary

Alumni Relations works with the Faculties and Units of UVic and the Alumni Association, an independent society of UVic graduates, to deliver programs and services, communications and foster a culture of philanthropy amongst the 130,000+ alumni in over 127 countries worldwide. It also engages with UVic students to encourage a lifelong relationship between them and their university. Engaged alumni contribute to UVic’s success through volunteerism, influence, mentorship, hiring coop students and philanthropy. Alumni Relations shares and celebrates the successes of our alumni to illustrate the impact of an UVic degree and to recognize the significant impact UVic is having on our society and the World.

Jointly reporting to the Director of Alumni Relations and to the Dean/Assistant Dean/Unit Head/Manager of an assigned portfolio the Alumni Annual Giving Officer is responsible for increasing alumni engagement and alumni gifts in their assigned portfolio. The Alumni Annual Giving Officer works directly with the Manager of Annual Giving, the Alumni Relations and other Annual Giving Officers, the Annual Giving Coordinator, the Alumni Relations team, and colleagues in Alumni and Development to plan and implement initiatives that build and increase annual support of the university from alumni. The Officer will devise and implement solicitation strategies focused around alumni groups and individual giving, primarily below $25,000. This position’s core responsibility is to engage alumni in the life of the University and advance the development effort by identifying, cultivating, soliciting, and stewarding alumni donors.

## 3. Key Responsibilities and Expectations

<table>
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<tr>
<th>Key Responsibilities</th>
<th>Expectations:</th>
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<tr>
<td>Alumni Engagement</td>
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<tr>
<td>% of time</td>
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<td>Creates a plan to identify, engage, and solicit alumni groups, as well as create and implement a fundraising plan for class reunions.</td>
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<td>Serves as primary contact for all alumni-related matters and inquiries relating to the assigned portfolio.</td>
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<tr>
<td>Participates in the identification, recruitment, training, management and stewardship of volunteers associated</td>
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- Coordinates the organization of alumni events and other engagement activities for the assigned faculty or unit(s). Includes working with volunteers, planning event logistics, managing invitation lists.
- Ensures accurate records and alumni activity are thoroughly and properly recorded and maintained in the alumni database.
- Works closely with the Alumni Relations Office, as well as unit-based Development Officers to maximize engagement and identify giving opportunities with alumni chapters, reunions, and other natural affinity groups.
- Works with Alumni Relations team to identify and capitalize on opportunities to collaborate with a broad spectrum of alumni events and other partners on campus such as Co-op, Athletics, student Services, and more.
- Where applicable, may collaborate with the Faculty’s Careers’ office, Co-op office, and Admissions office to engage alumni in events, mentorship opportunities, admissions initiatives, and more.

**Individual Giving 30%**

Based on the Annual Giving Business Plan, the Alumni Annual Giving Officer creates an annual strategic plan to identify, cultivate, solicit and steward alumni donors. The Officer implements and evaluates this plan to meet the set fundraising goal.

- Researches, develops, and implements plans for renewing, recovering, and acquiring new annual gift donors.
- Solicits donors through personal visits, mail, phone, and email.
- Collaborates with unit-based Development Officers, Planned Giving, Prospect Research, and Donor Relations to ensure solicitations are conducted in coordination with other fundraising programs, in ways that maximize effectiveness of every program. This should include but is not limited to a focus on identification of potential annual leadership and major gift prospects.
- Develops a strategy for potential and current annual donors within their portfolio.
- Works with other appropriate individuals to develop relationships with potential donors to the unit and continues building on existing relationships with donors.
- Researches and prepares briefing notes and contact reports for donor visits.
- Collaborates with Development Officers/Managers to plan ways to co-ordinate combined Faculty and Alumni Relations Office effort.
- Writes and designs letters, brochures, donation forms, and other appropriate materials for cultivation, solicitation and stewardship of annual gifts through the annual giving program.

**Communication 20%**

Responds to alumni donor inquiries, sends alumni donor communication to strengthen alumni relationships and giving and provides alumni participation updates to internal stakeholders.

- Respond to alumni inquiries via phone, email, and social media.
- Sends development information and updates to alumni.
- Drafts and sends reports on alumni participation and giving to internal stakeholders.
- Develops alumni profiles and other alumni-related materials for the website(s) and other alumni communications.
- Develops and implements communications strategy for the alumni of the assigned portfolio. Communications tools include, print, email, websites and social media.
- When necessary, develops and executes mass email communications to a segment of alumni.

### Special Appeals 10%

Works with Central Annual Giving to guide the strategy for unit/faculty based appeals through direct mail and e-solicitations.
- Identifies opportunities for specified alumni group and reunion giving solicitation campaigns.
- On occasion, appeals may require additional support, 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.

### 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 and engagement strategy to increase alumni participation, and coordinating multiple appeals, with varied methodologies, such as face to face solicitations, direct mail, email solicitations, and events, requires the Officer to work closely with other university constituents, e.g. Alumni Relations Staff, Development Officers, Prospect Researchers, 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.
- Raising alumni and annual gifts goals of their plans goals are in the range of a minimum of $100,000. Gift amounts are normally below that of a major gift; asks for donations and orchestrates the transaction.
- The Alumni Annual Giving Officer is accountable for measurable alumni engagement targets for engagement activities including but not limited to: event attendance, volunteering, and other engagement activity.
- The Alumni Annual Giving Officer is responsible for monitoring and maintaining accounts within a small budget and making moderate purchases and may develop special events budget accountable to the Faculty, Unit or Alumni Chapter.

#### Responsibility for Human Resources:
- Provides functional supervision to volunteers or student ambassadors, on short term or one off as part of engagement strategy. 10-50 alumni and student volunteers yearly.
- Works under direction from the Director of Alumni Relations and the Dean/Assistant Dean/Unit Head/Manager of the assigned portfolio. The Director manages the
performance and the Dean/Assistant Dean/Unit Head/Manager contributes feedback and participates in performance management.

**Impact of Decisions and Actions:**
- Responsible for ensuring alumni content on Faculty or Unit website is current, engaging and professional in appearance, with relevant and easily accessible information to donors and alumni.
- Responsible for the delivery of alumni programs and services, locally, nationally and internationally.
- Accountable to the donor for proper stewardship of donations.
- Decisions and plans made by the Alumni 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.
- Under the direction of the Director, Alumni Relations, takes the lead role on alumni strategy for respective portfolio. Alumni Strategy will be in line with central strategy but will be independent and reflect the individual faculty or Unit’s priorities. Develops solicitation strategies that related directly to University and Faculty or Unit priorities.
- 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.
- Primary point of response for alumni from their respective Faculty or Unit, representing the faculty and the university. Acts autonomously in liaising with members of the University community including Deans, Directors, faculty and colleagues in Alumni and Development.
- Works with allied professionals to write and edit briefing notes, proposals, research documents and other communication pieces.
- Works independently in person or on the phone with donors and key alumni. Uses discretion and independence in dealing with sensitive personal and donor information.

5. **Summary of qualifications:**

The successful candidate will have a bachelor’s degree and three years of related alumni, development or similar experience.

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.
- Knowledge and experience in organizing events

In addition this position requires
- Superior communication skills, including the ability to write and speak clearly and effectively, and to listen, and the capacity to engage, inspire, and persuade.
- Excellent leadership, interpersonal, organizational, and motivational skills.
- Excellent time management skills and ability to juggle many projects at once.
• Ability to build and maintain productive working relationships with all stakeholders.
• Due to the sensitive and confidential nature of the work being done, the incumbent must have tact and be mature, diplomatic and discreet.
• Ability to work effectively with a diverse population and with all levels of university personnel.
• Strong working knowledge of the policies and procedures of the University, Development Office, Alumni Relations and the respective Faculties and Units.
• A self-starter - creative team player who takes initiative and has the ability to work collegially with a broad spectrum of personalities.
• Computer proficiency and adaptability in using the MS Office software.

The following are considered assets and may be given preference:
• Experience in Development Office and knowledge of Development and/or Alumni Relations.
• Experience in volunteer management.
• Experience in writing case statements or promotional materials.
• University of Victoria alumni experience or background.
• Familiarity with Raiser’s Edge.
• Education and experience working in an environment relevant to the assigned portfolio.

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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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