1. **Position Identification**

<table>
<thead>
<tr>
<th>Position Number</th>
<th>994311, 991746, New +5</th>
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<tbody>
<tr>
<td>Position Title:</td>
<td>Leadership Giving Officer</td>
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<tr>
<td>Department:</td>
<td>Development</td>
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<tr>
<td>Reports to:</td>
<td>Manager, Development</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>SG 11</td>
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<tr>
<td>Last Updated</td>
<td>May 2019</td>
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2. **Position Summary**

The Leadership Giving Program of the Development Department conducts fundraising programs for the faculties and units for gifts between $1,000 - $24,999. The Leadership 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 researchers, and better our community.

Reporting to the Manager, Development, the Leadership Giving Officer is responsible for executing UVic’s Leadership Giving program. Working directly with the Development Manager, Deans, Department Chairs, Directors, and other members of the fundraising team, the Officer builds and maintains relationships with leadership level donors through high-value engagement activities. The Leadership Giving officer is responsible for building a pipeline of prospects and engaging them to further the mission of UVic. The Officer is responsible for raising $250,000 annually to support UVic strategic priorities.

The Officer manages a 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 working collaboratively with Development Officers in identifying and qualifying major gift (≥$25,000) and planned giving prospects in order to build these major gift portfolios. In managing their own leadership giving portfolio, the Officer observes ethical fundraising practices, and develops a prospect portfolio. The Officer executes a leadership giving plan to upgrade current and past leadership level donors, and acquire new $1,000-$24,999 donors primarily through independent personal contact.

3. **Key Responsibilities and Expectations**

<table>
<thead>
<tr>
<th>Key Responsibilities</th>
<th>% of time</th>
<th>Expectations:</th>
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<tbody>
<tr>
<td>Leadership Giving</td>
<td>Management 85%</td>
<td>• Raises a minimum of $250,000 annually to support UVic strategic priorities.</td>
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<td></td>
<td></td>
<td>• Engages, cultivates, and solicits a portfolio of autonomously identified potential or current leadership level donors.</td>
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<td>• Advises Development Officers and Planned Giving Officers of major gift donors and planned giving prospects who would benefit strategically from moving to major/planned gift officers.</td>
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<td>• Collaborate with Annual Giving to ensure coordinated solicitation strategies.</td>
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<td></td>
<td>• Devise innovative opportunities for engaging donors and prospects; develop creative pathways for transitioning from</td>
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</table>
annual level gifts to leadership giving and from leadership giving to major giving, and strategies to identify prospective donors

- Researches, develops and implements leadership giving strategies for renewing existing $1,000 - $24,999 annual leadership gift donors, recovering past $1,000 - $24,999 annual leadership gift donors, and acquiring new $1,000 - $24,999 annual leadership gift donors.
- Personally visits donors each year to solicit them for their annual leadership gift.
- Identifies, recruits, and supports appropriate individual stakeholders (such as Deans, Directors, Managers, Chairs, Faculty and students) 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, Managers, and in consultation with Deans, Department Chairs, and key faculty members as necessary.
- Identifies, traces, and researches prospects with potential capacity and interest, as identified through Prospect Research, the Manager of Development, news articles, online charitable databases, internet searches, and data mining.
- Works with Annual Giving team to coordinate appeals, monthly giving club, stewardship or related activities.
- Plans and attends 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, Managers, and other members of the fundraising team for high-level donor visits.
- Identifies, recruits and trains volunteers in support of Leadership giving initiatives

<table>
<thead>
<tr>
<th>Administration, Evaluation and Analysis</th>
<th>15%</th>
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<td>• Under supervision of Manager of Development, creates and implements an annual work plan for the annual leadership giving program.</td>
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<td>• Develops, implements, and supports program evaluation and review.</td>
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<td>• Maintains a donor-centered approach to clearance, in collaboration with Directors, Managers, Development Officers, fellow Leadership Giving Officers and faculty leadership to coordinate solicitation and recruitment strategies for key prospects.</td>
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<tr>
<td>• Maintains a personal budget for the leadership giving program.</td>
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<tr>
<td>• Works with Donor Relations to draft gift agreements, create acknowledgement letters, and send student thank you notes to donors.</td>
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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 requires the Officer to work closely with other university constituents, e.g., Deans, Department Chairs, Faculty members, Development Officers, Prospect Researchers, Development and 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 leadership gift goal is in the range of $250,000 minimum. Asks for donations and orchestrates the transaction.
• Responsible for maintaining a small budget for travel and expenses as well as moderate purchases.

Responsibility for Human Resources:
• Works under direction from the Manager, Development who manages the performance. Works with Deans, Unit Heads regularly as needed.
• Recruiting and supervising volunteers to help raise leadership gifts

Impact of Decisions and Actions:
• Accountable to the donor for proper stewardship of donations.
• Decisions and plans made by the Leadership 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.
• Works to support other Alumni & Development initiatives, including but not limited to Giving Tuesday, Kind Mail, etc.

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.

Experience requirements:
• 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.

Knowledge requirements:
• 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:
• 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 The Raiser’s Edge.

Employee’s Signature:  
Date:

Manager’s/Supervisor’s Signature  
Date: