#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Campaign Director

**Job Number:** X-391 | VIP: 1640

**Band:** EXEMPT- 8

**NOC:** 1123

**Department:** External Relations & Development

**Supervisor Title:** Associate Vice-President, Philanthropy & Alumni Engagement

**Last Reviewed:**  April 20, 2022

#### **Job Purpose:**

The Campaign Director provides leadership and strategic direction for our Major Gift, Planned Giving & Leadership Giving Programs. The cumulative goal of these programs will be to raise in the range of $1.5 to $2.4 million per year, with ambitions to amplify this goal in future years.

This role supervises our Senior Development Officers and Development Officer: including assigning fundraising priorities, prospects and monitoring prospect pipelines to ensure good movement. The Campaign Director will advise on strategies for approaches when needed. The Campaign Director is responsible for hiring, training, supervising and ensuring annual fundraising goals are met.

The Campaign Director is responsible for a personal portfolio of 100 – 125 prospects, each with the capacity to make gifts of between $100K and $500K.  This role actively moves individuals through the stages of relationship management including identification, cultivation, solicitation and stewardship. The Campaign Director consults with the Stewardship Manager on matters related to gift recognition when creating proposals as well as acknowledging the efforts of our volunteers.

The Campaign Director oversees Trent’s Planned Giving Program and is the technical expert. This role deals with the complexities of estate administration including having legal signed off by Trent’s signing officers and ensuring the final estate accounting is accurate. Due diligence is necessary.

The Campaign Director plays a critical role in developing strong relationships on behalf of the University and in fostering a culture of philanthropy at the University.

#### Key Activities:

**Leadership & Strategic Planning / Major Gifts, Leadership Giving & Planned Giving Programs:**

* The Campaign Director will oversee Trent’s Major Giving, Planned Giving & Leadership Giving Programs. The Campaign Manager will work with research to appropriately assign prospects to Key Relationship Managers. Ensures that annual fundraising goals will be set to create sustainable Giving Programs with clear moves management objectives.
* Responsible for ensuring the Major Gifts, Planned Giving and Leadership Giving Programs meet their annual goals of a minimum $1.5 - $2.4 Million annually. Must meet personal annual fundraising target of between $500,000 - $800,000.
* The Campaign Director will oversee the SDOs in management of their major gifts portfolio including advising on stewardship and cultivation strategies to ensure that all fundraising efforts are effective, efficient, and successful.
* Additionally, the Campaign Director will have oversight of the Development Officer - Leadership Giving Program, which includes the Board Annual Request, Faculty & Staff Approaches as well as coordination of Giving Tuesday and Trent Day.
* The Campaign Director will have full oversight of Responsible the Campaign Budget.
* The Campaign Director will oversee Trent’s Planned Giving Program. By incorporating legacy giving as part of the regular development activities of all fundraisers, the Campaign Director will be the lead expert for technical knowledge related to Planned Giving. As major gift prospects are identified and approached, a request will also be made for consideration of a legacy gift to Trent University. Inquiries not handled already by other key relationship managers will be managed and followed up by the Campaign Director. Collaborating with the Stewardship Manager, the Campaign Director will ensure the proper stewardship of our Legacy Society members. The Campaign Director will ensure regular promotion strategies of our Planned Giving Program. Maintain tracking and reporting on expectancies and legacy society growth on an on-going basis. Work with the AVP to set program goals and objectives. The Campaign Director will stay abreast of relevant estate planning issues.

**Volunteer Management:**

* Responsible for recruitment of necessary volunteer leadership to resource our campaign’s executive teams. Identify, recruit, train, and motivate volunteers. Volunteers will be needed to assist with leadership and Campaign fundraising as well as crowd sourcing activities.
* Planned Giving Advisory Committee: The Campaign Director will actively recruit allied professionals to the advisory to promote and provide input on estate giving. Allied professionals include lawyers, accountants, investment and wealth managers, etc.

**Stewardship & Special Events:**

* In collaboration with the AVP, Philanthropy & Alumni Engagement and the Stewardship Manager, ensures donors are thoroughly stewarded through appropriate and meaningful recognition opportunities including donor walls, naming opportunities, gift celebrations, and named endowments. Leverages annual endowment reports as an opportunity to visit donors to further cultivate their next gift.

**Managerial Responsibilities:**

* The Campaign Director is a member of the AVP’s senior leadership team.
* Develops, implements, monitors, and reports on major gifts, leadership giving and legacy giving programs.
* Hires, trains, coaches, reviews, supervises, and directs all Development Officers. The SDO (Science) is co-supervised with the Dean of Arts & Science (Science).
* Provides input into portfolio objectives for fundraising goals. Assists with development of short and long-term strategies/plans.
* Maintains an active understanding of trends and best practices for donor cultivation, solicitation as well as giving incentives and tax relevant issues. Liaises regularly with other universities and non-profit sector organizations to exchange information on best practices.
* Contributes to the overall development, implementation and evaluation of our operating plan and strategies that leads to fundraising success. Monitors major gift, leadership giving and planned giving results and progress, is essential for achieving our collective goals.
* Collaborates with all members of the Advancement Services, Alumni Engagement & Services as well as any University department that requires support.

#### Education Required:

* Honours University Degree (4 years), Trent University Degree would be beneficial.
* CFRE designation would be an asset.
* Master’s Degree preferred.

#### Experience/Qualifications Required:

1. Experience working in a university environment would be preferred
2. Minimum ten years’ experience in senior-level fundraising with a proven track record involving face-to-face cultivation, solicitation, and relationship management. Experience in higher education fundraising desirable. Equivalent experience in a related field such as sales and marketing, communications, financial services or other may be considered.
3. Excellent knowledge of major gift, leadership and planned giving fundraising practices and considerations, including moves management and pertinent tax planning considerations; endowment funding, leadership giving and capital campaign experience essential.
4. Excellent interpersonal and communication skills. Demonstrated ability to interact comfortably, tactfully, professionally and effectively with a wide range of internal and external constituencies and stakeholders, including volunteers, donors, faculty and staff, and community members. Superior written communication and proposal writing skills, and experience in prospect research.
5. Demonstrated ability to lead and motivate staff, volunteers and donors; previous experience with senior volunteers and committees is essential.
6. Demonstrated ability to develop strategic and tactical plans, establish goals and accomplish them as part of an organizational plan.
7. Excellent organizational, planning and time management skills, with demonstrated ability to manage multiple tasks and flexibility in meeting shifting demands and priorities.
8. An entrepreneurial spirit and ability to think creatively to problem solve.
9. Demonstrated ability to work independently and as part of a team.
10. Proficiency with MS Office (Word, Excel), internet research, Raiser’s Edge database.
11. Flexibility to work on occasional weekends.
12. Must be willing and able to travel locally, regionally, and occasionally nationally.
13. Must have a valid class ‘G’ driver’s license to meet the travel requirements of the job.

#### Supervision:

Recruit, orient, train, direct, manage and evaluate the performance of:

* Senior Development Officers (2)
* Development Officer, Leadership Giving
* Development Officer, Major Gifts

**Job Evaluation Factors:**

**Analytical Reasoning**

This role requires complex reasoning and significant analytical skills. Fundraising Campaigns require strong analytical thinking and planning to ensure their success. The role has to anticipate what will be inspiring for individuals to support and necessary for the University. Motivating staff and volunteers requires clear leadership as to the direction being taken. Successful fundraising requires creative innovative thinking that is flexible and robust enough to attract funding for a wide variety of funding opportunities as well as negotiation abilities when finalizing gifts.

Examples:

* Developing Campaign and Major Gift, Planned Giving & Leadership Giving Program strategic plans
* Recruitment, orientation, management and evaluation of staff & volunteers
* Develop, manage and analyze campaign budget
* Develop strategic approaches to potential donors requiring internal and external research based on analysis and alignment of donor interests with Trent’s needs
* Ability to negotiate complex planned giving strategies with donors including charitable remainder trusts, gifts of life insurance and gifts of publicly traded securities.

**Decision Making**

Campaign Directing has few policies or procedures. Fundraising is a creative activity that requires broad flexible thinking to determine the best strategies to put into place. The role creates fundraising programs, decides on what priorities should be put forward for giving days, and assigns prospects based on capacity and area of interest. There is a high level of strategy required to determine the best course of action.

Philanthropy is a pan-university activity, like the three comparable roles. Cybersecurity, Manager of the Provost Office and Assistant Registrar, which all navigating competing priorities, deal with budgets and staffing. It is up to this role to determine how to deploy staff focusing on each effort, how programs are run and how to execute success strategies for each.

Decision making is complex. This role is responsible for planning the work, formulating strategies, and providing direction to staff.

* Complex decision-making on a daily-basis in all the areas identified under analytical reasoning.
* Negotiation and decision-making with volunteers, donors, and stakeholders
* Based on research, determine specific actions to engage potential donors and steward existing donors
* Experience, discretion, tact, and judgment are required.

**Impact**

As this role directs campaigns that support all areas of the University – impact extends to both the academy and ancillary areas. Philanthropy supports all undergraduate and graduate programs, thus impact affects retention and recruitment.

Success in fundraising, directly impacts Trent’s reputation. It supports capital improvements (ie. Student Centre, Bata Library, Trent Durham GTA, etc).

Philanthropy reaches all corners of the University, from art to athletics, from experiential learning to research and capital projects. Impact of this role is pan-university, reputation critical and empowering to the academy.

##### Responsibility for the Work of Others

##### Direct Reports

##### Recruit, orient, train, direct, manage and evaluate the performance of:

##### Two Senior Development Officers

* Development Officer, Annual Leadership Giving
* Development Officer, Major Gifts

Indirect Reports

* ER&A team members; Ensure maximum effort is made to successfully implement moves management within the donor pool and that stewardship of major donors are implemented with major gifts donors.
* Alumni Engagement & Services; Ensure targeted outreach is implemented.
* 30+ Volunteers; Ensure appropriate recruitment, orientation and deployment in philanthropic initiatives.

##### Communication

##### Internal:

##### With Communications team to develop support materials to enhance the relationship with donors and prospects

#####  Engage senior administrators and academic community (deans, chairs, faculty, researchers, staff) to develop, cases for support, content for proposals as well as to assist with the cultivation and stewardship of donors and prospects

##### With advancement team members: prospect clearance & strategy, development of donor lists and research support

##### With select alumni, volunteers and board members: to engage as donors, assist with cultivation, solicitation and stewardship

##### External:

##### Donors and prospects (corporate, individual, foundations) for the purpose of seeking support for Trent’s priorities (i.e. scholarships, research, etc.)

##### Non-governmental organizations whose purposes match Trent initiatives – i.e. environmental organizations for the purpose of promoting Trent’s strengths and achievements

##### Targeted individuals who can assist in expanding the pool of potential supporters and key contacts for Trent

##### Motor/ Sensory Skills

##### Keyboarding & mouse manipulation - Computer usage impacts upon majority of responsibilities

##### Driving - To attend internal and external meetings

##### Dexterity/Coordination - Interaction at special events

##### Hearing, speech and visual: complex remote and face to face communication, negotiation and presentations

##### Effort

##### Mental:

##### Sustained concentration & focus:

##### Research, strategy development – for content and prospects, proposal writing

##### Interacting and negotiating with prospects, alumni, volunteers, etc.

##### Prospect identification and qualification

##### Maximize Trent’s outreach in the Toronto market – i.e. expand giving from existing donors, develop new prospects, steward Toronto based donors (including alumni)

##### Physical:

##### Long periods of time spent keyboarding, in meetings

##### Frequent driving and travel requiring more than one hour

##### Working Conditions

##### Physical:

##### Long periods of time spent keyboarding, in meetings,

##### Frequent driving and travel requiring more than one hour

##### Prolonged standing at special events

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##### Psychological:

##### Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks

##### Flexibility to work occasional weekends

##### Local, regional and occasional national travel expected

##### Frequently deal with donor sensitivities and occasionally stakeholder complaints

##### Stress imposed by quarterly and annual fundraising and program objectives