#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Development Officer, Annual Leadership Giving

**Job Number:** X-401 | VIP: 1677

**Band:** EXEMPT-6

**Department:** External Relations & Advancement

**Supervisor Title:** Campaign Director

**Last Reviewed:**  July 16, 2021

#### **Job Purpose:**

Reporting to the Campaign Director, the Development Officer – Annual Leadership Giving is directly responsible for fundraising efforts related to priority philanthropic opportunities of the University.

The Development Officer manages a portfolio of 100-125 leadership donors and prospects, each with the capacity to give between $1,000 and $25,000 annually to Trent University. Areas of responsibility include research and prospect identification, cultivation, proposal development, solicitation, stewardship, and volunteer management. The incumbent will assume responsibility for volunteer leadership, faculty, and staff relationships, and achieving fundraising objectives for priority requirements in their assigned program area, as well as general university needs. The Development Officer will be responsible for coordination of Giving Days such as Giving Tuesday and Trent Day.

The ability to encourage giving and discuss philanthropic options with donors is expected. This position maintains current knowledge in areas related to leadership gifts, individual, corporate, and foundation philanthropy. General knowledge of planned giving is needed for this role. The Development Officer plays a critical role in developing relationships on behalf of the University and in fostering a philanthropic culture at the University.

#### Key Activities:

##### Leadership Gifts Portfolio Management and Program Development

* In close collaboration with the Campaign Director, the Development Officer – Annual Leadership Giving assists in the development and implementation of a sustainable leadership gifts program in order to meet fundraising goals, moves management objectives, key performance indicators and other measures.
* Develops and implements strategies and plans for a rolling portfolio of 100-125 prospects, each with the ability to leverage the impact of philanthropy at the university and with the capacity to give between $1,000 and $25,000 annually. Prospects include individuals, corporations (philanthropy, partnership, or sponsorship) and foundations in addition to staff and faculty, alumni, volunteers, friends and parents of students or alumni. The Development Officer – Annual Leadership Giving meets an annual fundraising target of at least $250,000.
* The Development Officer manages specialized appeals such as Trent Day, Giving Tuesday, the Board of Governors Scholarship appeal, as needed.
* Participates in prospect clearance and qualification with the Campaign Director and the Key Relationship Managers’ (KRM) team and proactively secures meetings with prospects to discuss their links, interests, and opportunities to give. Carries out targeted project and prospect research; prepares appropriate briefing materials, profiles and meeting notes providing clear direction on specific next steps with each prospect; develops proposals and financial illustrations for prospects and their advisors; and acts as a lead or co-solicitor with volunteers or staff as assigned or required.
* In collaboration with the Campaign Director, assists in shaping fundraising goals and other priority objectives. Participates in cross-portfolio working groups.
* Builds relationships with university faculty, staff, alumni and community friends in order to engage them in the university’s philanthropic efforts. This includes donor identification and research, cultivation, proposal development, solicitation, and stewardship.
* Maintains in-depth knowledge of the University as well as the faculty, program initiatives, and strategic directions within their assigned program areas, and acts as a key information source.
* Identifies marketing needs for assigned funding priorities and collaborates with the Senior Integrated Engagement Manager to produce materials or other supports.

##### Volunteer Management

* Assist the Campaign Director with identification, recruitment, training, management, motivation, leadership and accompaniment of assigned volunteers through their involvement in the donor cycle.

##### Stewardship & Special Events

* Collaborates with the Manager, Philanthropic Stewardship to ensure stewardship of donors within your portfolio.
* Assists in providing effective stewardship for assigned donors, including relevant university-wide or ER&D activities, events and team projects. Attends ER&D events and University events as needed.

##### Administration & Managerial Responsibilities

* In collaboration with the Campaign Director actively participates in the development, implementation, and evaluation of the annual operating plan, strategies, policies and procedures.
* Ensures regular reports on progress within the program area and portfolio of prospects under management, and reports on relevant key performance indicators.
* Responsible for documenting all key development activity using the fundraising database and other electronic and central filing systems as appropriate, with particular emphasis on call reports and related cultivation and solicitation activity.
* Maintains up-to-date knowledge of leadership gift fundraising, including effective solicitation techniques, giving incentives and relevant tax issues.

##### Collaborate on Other Assignments

* Provides support on special projects as determined by the Campaign Director.

#### Education Required:

* Honours University Degree (4 year) in a related discipline; a Trent University degree would be beneficial.
* CFRE designation would be an asset.

#### Experience/Qualifications Required:

* Minimum five (5) years of experience in leadership gift fundraising with a proven track record involving face-to-face cultivation, solicitation, and donor relations. 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.
* Basic knowledge of leadership giving fundraising practices and considerations, including moves management and pertinent tax planning considerations. Endowment funding, leadership giving, and capital campaign experience would be an asset. General knowledge of planned giving would also be an asset.
* 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.
* Demonstrated ability to lead and motivate volunteers and donors; previous experience with senior volunteers and committees is essential.
* Demonstrated ability to develop strategic and tactical plans, establish goals and accomplish them as part of an organizational plan.
* Excellent organizational, planning and time management skills, with demonstrated ability to manage multiple tasks and flexibility in meeting shifting demands and priorities.
* An entrepreneurial spirit and ability to think creatively to solve problems.
* Demonstrated ability to work independently and as part of a team.
* Proficiency with MS Office (Word, Excel), internet research, fundraising databases.
* Flexibility to work on occasional weekends.
* Must be willing and able to travel locally, regionally, and occasionally nationally.
* Must have a valid class ‘G’ driver’s licence to meet the travel requirements of the job.

#### Supervision:

* No formal supervision of others is required.

**Job Evaluation Factors:**

**Responsibility for the Work of Others**

Indirect Responsibility for the Work of Others:

* ER&D team members – ensure maximum effort is made to successfully implement moves management within the donor pool and that stewardship plans are implemented with leadership giving donors
* Alumni relations – ensure targeted outreach is implemented
* Volunteers – ensure appropriate recruitment, orientation, and deployment in philanthropic initiatives
* Marketing & Communications Staff – ensure media and marketing materials are accurate and supportive of donors

**Communication**

Internal:

* Engage administrators and academic community (chairs, faculty, researchers, staff) to develop content for proposals and 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., capital, scholarships, research, etc.)
* 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 and direct response materials writing. Interacting and negotiating with prospects, alumni, volunteers, etc. Prospect identification and qualification. Expand giving from existing donors, develop new prospects.

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

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
* Some evening work will be required, especially during peak fundraising months
* Frequently deal with donor sensitivities and occasionally stakeholder complaints
* Stress imposed by quarterly and annual fundraising and program objectives