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PHILANTHROPY OFFICER, OPERATIONS

NATURE AND SCOPE OF WORK

The Philanthropy Officer, Operations provides direct support to the Director, Philanthropy & Alumni Relations, managing logistics, scheduling database entry and communications. The position provides front line customer service to donors, sponsors and alumni, in support of the Philanthropy and Alumni Relations (PAR) department's engagement and fund development goals. Working collaboratively with the PAR team, under the guidance of the Director, Philanthropy & Alumni Relations, and the Philanthropy Operations Officer will work collaboratively with the data analyst to ensure that sponsorships and donations are processed, tracked and fulfilled in a timely and appropriate manner. The Officer supports the administrative needs of PAR team and routinely interacts with senior university administrators, faculty members, deans, key volunteers, donors and prospects on behalf of the Director.

The Philanthropy, Officer is privy to confidential information and must exercise appropriate judgment in adhering to privacy laws. The position reports to the Director, Philanthropy & Alumni Relations.

ILLUSTRATIVE EXAMPLES OF DUTIES

Stewardship & Events

- Collaborates with the data analyst to coordinate donor correspondence: thank you letters, tax receipts, and segmented communications to constituents in a timely manner. Actively collaborates with the PAR team to provide logistical support for PAR communications initiatives and events when required.
- Provides support in the planning and execution of PAR events focused on donors (prospective and existing), alumni, volunteer leadership and university partners and coordinates follow-up activities with Director and relationship managers as appropriate.

Leadership Support

- Maintains the Director's daily schedule, travel and accommodation, schedules appointments and meetings. The Officer is the point of contact between the donors/prospects, University administration and the Director and must maintain a high degree of confidentiality and tact.
- Sets up fundraising visits or calls with key volunteers, major prospects and donors, often requiring the coordination of several individuals' calendars, in multiple geographic locations. Coordinates campus visits or external meetings by handling special arrangements, meals, transportation, and accommodation.
- Ensures accuracy and input of all database entries (actions, contact reports, notes) for the Director and VP of University Relations into NXT database.
- Interacts with the President's Office and other administrators to relay information, and coordinate their involvement in engagement, fundraising meetings and events activities.
- Facilitates DAR meetings by booking facilities, audio/visual, preparing information, agendas, action items for related PAR meetings.

Administration

- Provides excellence in front line customer service including handling calls, facilitating donations by phone, email or online, receiving visitors and answering inquiries
- Collaborates with the Data Analyst to ensure that all gifts are processed in a timely and accurate manner.
- Collaborates with the Data Analyst and Financial Services to ensure accurate reconciliation of data and financial information between NXT database and the University's accounting systems. Coordinates employee donations deducted from payroll; prepares deposits and batch reports (with the Data Analyst); assigns cost centres and manages transfers of funds; reviews management reports in order to monitor programs and cost centres to ensure funds are allocated appropriately.
- Works with the Director and the Philanthropy Officer, Leadership Giving to ensure that donations are moved to the appropriate cost centre in a timely fashion.
- Tracks and enters relevant information and actions regarding donations into NXT within 72 hours of receiving the donation.
- Processes and coordinates cheque requests, purchase orders, fund transfers, office supplies, travel claims, expense reports, petty cash, cost centre monitoring and maintains department electronic and hard copy filing systems. This includes periodic audits with the team to ensure that documentation is being appropriately saved and accessed.
- Oversees onboarding/orientation for department and coordinates office and technology additions and moves with IT and Facilities if necessary.
- May be required to take training and act in the capacity of a floor warden as part of the College's Emergency Preparedness Plan (Fire, W.H.M.I.S., and Earthquake).

- Performs other duties related to the requirements of the position.

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Ability to provide a high level of customer and donor relations services to enable effective working relationships with internal and external contacts.
- Thorough knowledge of business English, spelling and arithmetic with the ability to present information concisely and effectively, both verbally and in writing.
- Considerable knowledge of financial management, client relationship management and CRM database management systems specific to this field such as NXT, Banner, etc.
- Considerable knowledge and understanding of development and University financial accounting procedures.
- Thorough knowledge of Office products like Word, Excel, PowerPoint and other project management programs. etc.
- Working knowledge of fundraising ethics, practices, regulations and Donor Bill of Rights.
- Ability to maintain a high degree of confidentiality and to handle sensitive issues with tact and diplomacy and maintain confidentiality.
- Ability to work as part of a team, be flexible and adaptable, with a can-do attitude to further PAR team objectives.
- Attention to detail and accuracy, with an understanding of the repercussions of errors on the reputation and credibility of the University.

REQUIRED TRAINING AND EXPERIENCE

- Completion of two years (approximately 60 credits) of post-secondary education comparable to the Diploma in Business Administration program offered at Capilano University. Work requires communications, accounting, analytical and organizational skills.
- Three years of experience in philanthropy and fund administration necessary to coordinate fund operations and other special fund development activities including experience in a post-secondary environment.