

Class No.:	Staff
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Pay Group:	28

CLASS SPECIFICATION

PHILANTHROPY OFFICER, INDIVIDUAL GIVING

NATURE AND SCOPE OF WORK

The Philanthropy Officer, Individual Giving oversees the University's individual giving program. This position is responsible for the planning, implementation, development, and evaluation/reporting of individual fundraising appeals supporting students, alumni, and employees. The Philanthropy Officer, Individual Giving works closely with the philanthropy team to ensure that all fundraising activities are coordinated, aligned with university priorities, and compliant with policies. Additionally, this position cultivates and maintains key relationships with donors, particularly at the major gift level, and handles confidential information with discretion. This position reports to the Manager, Fundraising, Philanthropy & Alumni Relations.

ILLUSTRATIVE EXAMPLES OF DUTIES

- Works collaboratively with the Manager, Fundraising, to establish fundraising objectives and targets for individual giving in partnership with a variety of internal and external stakeholders.
- Develops and implements fundraising strategies for individual giving in collaboration with philanthropy team members.
- Manages and solicits prospects at the leadership and major gift level, with a primary focus on securing gifts of \$25,000 and above.
- Oversees all aspects of the donor cycle: initiates contact with potential donors; develops appropriate cultivation strategies in consultation with, but not limited to, the philanthropy team, University leadership, Foundation board members and Alumni Association members; moves potential donors in an appropriate and timely fashion toward solicitation and closure; works with the philanthropy team to develop and execute donor stewardship strategies for the individual giving program, and ensures stewardship activities are implemented per the established plan.

- Designs and executes the individual giving program in consultation with the Manager, Fundraising; analyses data to conduct strategic prospect segmentation, strategizes and develops communications initiatives with the Fundraising Communications and Research Specialist and helps to prepare; donor/prospect solicitation materials, case statements, presentation materials and proposals.
- Offers strategy counsel to the Manager, Fundraising and identifies prospective and current donors to move forward in the pipeline.
- Reviews donors of the individual giving program and identifies prospects to cultivate for major, leadership and planned gifts.
- Develops and implements strategies to improve donor renewal and reduce donor attrition and default rates.
- Works with philanthropy team members to establish gift agreements for endowed and non-endowed funds.
- Supports the planning, coordination, and delivery of fundraising events, ensuring alignment with individual giving strategies and maximizing engagement with current and prospective donors.
- Safeguards the confidentiality of donor information and ensures all activities relating to the protection of personal information of donors are consistent with University policies and governing legislation. Works collaboratively with senior management and other departments to position the University as the charity of choice.
- Promotes and represents the University with potential donors and the community; conducts presentations to donors and participates in donor, alumni and community events.
- Utilizes NXT to track and manage confidential donor and prospect information; takes an active role in maintaining skills and keeping abreast of NXT upgrades to support fundraising objectives.
- Performs duties related to the qualifications and requirements of the position.
- May be required to take training and act in the capacity of a floor warden as part of the University's Emergency Preparedness Plan (Fire, W.H.M.I.S., Earthquake).

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint) and web-based platforms for communication, design, and data management.
- Thorough knowledge of fundraising legislation and regulations.
- Considerable knowledge of Raiser's Edge NXT of other fundraising CRM.
- Knowledge of post-secondary philanthropy department policies and procedures.
- Ability to communicate persuasively, both written and verbal, with a variety of audiences.

- Ability to adhere to the highest ethical standards; demonstrates empathetic disposition and perseverance; reflects optimistic and positive attitude, conveys sensitivity to needs of donors.
- Ability to maintain a high degree of confidentiality and discretion and to handle sensitive issues with tact and diplomacy.
- Ability to represent the University effectively and professionally.
- Ability to efficiently organize and manage a diverse range of assignments with tight deadlines with a thorough attention to detail.
- Ability to think strategically, take action and apply organization skills in order to meet deadlines and achieve results.
- Ability to gain trust and confidence of colleagues and constituents and to work with people from a variety of culturally diverse backgrounds.
- Ability to act with independence of judgment with minimal supervision.

REQUIRED TRAINING AND EXPERIENCE

- Completion of a bachelor's degree. Work requires communications, analytical and organizational skills.
- Minimum of five years of experience in fund raising. Must have a solid record of professional accomplishments in annual fundraising, including firsthand involvement and experience with various giving vehicles.
- Experience interacting with senior level leaders.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS

- Valid Class 5 driver's license.
- Access to a vehicle is required for donor visits and related travel.