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CLASS SPECIFICATION

PHILANTHROPY OFFICER, LEADERSHIP GIVING

NATURE AND SCOPE OF WORK

Encouraging philanthropy to support Capilano University's unique role, purpose, mission and mandate as part of the Envision 2030 plan, the Philanthropy Officer, Leadership Giving leads the strategy and implementation of raising funds at the Leadership ($5K to $9,999) and Major Gift level ($10K to $25K). The philanthropy officer structures, implements and monitors a highly-effective development services program providing leadership to administering University donor-established funds and ensuring donor stewardship with regular and timely impact reporting and communications.

The philanthropy officer, leadership giving works in concert with their philanthropy and alumni relations colleagues to build and strengthen relationships with prospects, donors, faculty, key partners and other University employees. The philanthropy officer, leadership giving is privy to confidential information and must exercise appropriate judgment adhering to privacy laws and other governing legislation. The position reports to the Director, Philanthropy & Alumni Relations.

ILLUSTRATIVE EXAMPLES OF DUTIES

- Responsible for soliciting funds and managing a portfolio of prospects at the Leadership and Major Gift level.
- Participates in drafting fund administration policies and procedures that provide for effective monitoring of all University donor-established funds.
- Prepares training material and delivers training sessions and in-services to internal philanthropy and alumni staff and other university employees related to enhancing knowledge on donor-established funds, both endowed and non-endowed.
- Monitors regulatory changes and reporting requirements relating to fund administration and charitable matters and implements appropriate systems and processes to comply with charity law, BC Societies Act, GAAP and other relevant requirements.
- Works with financial services to assist in ensuring that the administration of donor-established funds (both endowed and non-endowed) within the University operate under the

provisions of the University Act, University policy, the donor bills of rights, the Canada Revenue Agency and Generally Accepted Accounting Principles.

- Ensures that donor-established fund decisions are made based on accurate information by communicating in an effective and collegial manner with all internal and external community constituents.
- Assists in the integration of financial information and associated timelines related to donor-established funds within the department's CRM and facilitate in the reconciliation of monies available for disbursement in conjunction with financial services.
- Provides financial statistical analysis and forecasting and recommends to director the annual revenue targets for donor-established funds based upon pledge renewal schedules, anticipated annual dollar values and historic information.
- Organizes and attends donor meetings both on and off-campus a few times a month or as required.

Responsible for the administration of all donor-established funds processes:

- Implements annual donor pledge payment forecast and schedules related to renewals and upgrades in conjunction with appropriate relationship managers to achieve annual revenue targets.
- Tracks and implements gift agreements to ensure alignment and identifies funds not meeting minimum levels, collaborating with the appropriate philanthropy team members to develop and implement strategies to bring funds in-line with University policies.
- Responsible for generating the term funds disbursement report and annual processes in cooperation with financial services and financial aid & awards.
- Prepares draft revisions of fund terms of reference for the consideration of the director to ensure alignment with established University practices and existing legislation.
- Communicates with faculties and departments regarding donor-established funds and apprises financial services of fund changes, revisions and deactivations of donor funds.
- Responds to donors' enquiries regarding donor-established funds and provides oversight for non-assigned donor relationships at the Leadership ($5K to $9,999) and Major Gift level ($10K to $25K).
- Assists relationship managers in the creation of funds by providing advice and support in the development of terms of references, navigating the approvals process, including the development of gift agreements and determination of appropriate recognition elements.
- Tracks and enters relevant information and actions regarding endowed and non-endowed funds into Raiser's Edge/NXT responsible for content development to ensure that endowed and non-endowed fund communications on webpages are current.

Responsible for the administration of departmental stewardship practices

- Keeps abreast of industry best practice relating to donor-centric stewardship and implements appropriate materials and processes across the department.
- Updates all stewardship materials annually, including but not limited to: thank you letters, tax receipts, donor packages, Impact reports, etc. and prepares them for approval according to the plan.
- Tracks important information regarding major donors, i.e., birthdays, anniversaries, special accomplishments, in connection with cultivations and solicitations.
- In conjunction with the development operations officer and other team members, contributes to the development and implementation of the department's goals and schedule of activities and communications with a specific focus on stewardship activities identified with the matrix and departmental plans, including the coordination and dissemination of stewardship plans in conjunction with relationship managers.
- Provides support in the planning and execution of events focused on donors (prospective and existing), alumni, volunteer leadership and university partners and coordinates follow-up activities with relationship manager as appropriate.
- Supports the philanthropy team in the development and maintenance of effective relationships with prospects, donors, alumni and other key stakeholders through the creation of stewardship/impact reports and stewardship strategies and ensures appropriate recognition and accountability for donors as per agreements with the University including the distribution of student thank-you letters to the appropriate donor(s).
- Collaborates with the philanthropy and alumni team, University Events and other University units to plan and facilitate stewardship, funds and special events to ensure philanthropy generated invitation and mailing lists are accurate.
- Creates and implements generic donor-centric communications including but not limited to: a donor impact reports, social media, webpages, volunteer email and calling program.
- Performs tasks and other duties in keeping with the objectives of the department as 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., and Earthquake).

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Working knowledge of fundraising cycle best practices, policies and regulations.
- Ability to raise funds at the Leadership ($5K to $9,999) and Major Gift level ($10K to $25K)
- Thorough knowledge of word processing, spreadsheet, database, presentation and

Internet browsing applications.

- Thorough knowledge and understanding of confidentiality due to the sensitive and confidential information this position has access to. Ability to exercise appropriate judgment and adhering to privacy laws and other governing legislation when handling confidential information.
- Strong technical knowledge of fund administration best practices and applicable laws and legislation governing them.
- Familiarity with financial management and client relationship management tools such as Banner and Raisers Edge an asset.
- Ability to read and understand financial information.
- Ability to plan, organize and implement work around fund administration and stewardship to effectively meet deadlines and organizational requirements.
- Demonstrated ability to research, present and write donor-centric communications with internal and external audiences with little to no background in donor-established funds management.
- Considerable proficiency in business English and spelling.
- Ability to act with independence of judgement with minimal supervision.
- Ability to work in a dynamic team environment.
- Ability to be detail oriented and show attention to accuracy.
- Ability to maintain a high degree of confidentiality and to handle sensitive issues with tact and diplomacy.
- Ability to establish and maintain effective working relationships with and provide quality service to donors, team members, University employees, volunteers and other external contacts.
- Ability to work occasional evenings, arrange transportation and attend donor meetings on and off campus.

REQUIRED TRAINING AND EXPERIENCE

- Bachelor's degree, with a specialization in business administration, public relations or communications.
- Three years of experience in fund development and administration including communicating with donors and carrying out stewardship activities including experience in a post-secondary institution.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS

- CFRE credential would be an asset.