



## Unclassified Professional Staff Position Description

Initial Date:  Revised Date: 3/12/19

### Purpose of the Position Description

- To record the essential functions of the position
- To record special requirements
- To record required knowledge and skills to perform the duties of the position
- To record special working conditions
- To aid in recruitment and selection
- To establish Management's expectations
- To provide a base for managing performance

### Position Status

Incumbent's Name: \_\_\_\_\_  
Position Title: Development Officer – Major & Planned Giving OR Development Officer – Major Gifts  
Position Number: \_\_\_\_\_  
Department/Division: Advancement  
Type of Appointment: 12 mo.  9 mo. \_\_\_\_\_ Other \_\_\_\_\_  
Contract Period: asap to 6/30/22  
Supervisor: Erin McDonough

### Program Information

- A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.

Advancement is responsible for community relations, fund raising, prospect research, alumni relations, and the operation of the Western Oregon University Foundation. The purpose of this office is the cultivation of alumni and other potential donors through their involvement with the University; research and preparation of grant and gift solicitations; management of gifts, grants and bequests to the Foundation. All campus units are affected by the results and the accomplishments of this office. Availability of scholarship funds directly affects the student population along with financial assistance for academic programs and activities that impact the student experience. The functions of this office are directly related to the mission of the University, which is to provide a quality program of higher education by promoting the University's teaching, research, and community service programs, involving the Alumni and community in the activities of the University, and promoting aid for the institution through private gifts.

B. Describe the purpose of this position and how it functions within this program.

This position is critical to the fundraising/development success of the university. It is directly responsible for the cultivation and solicitation of gifts towards the monetary goals of the Foundation and university.

<h2>Position Information and Qualifications</h2>
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A. Description of Duties/Responsibilities:

List **major** duties assigned to the position. Note the percentage of time each listed duty is performed. Place an asterisk (\*) by each duty that represents an essential function.

<u>Percent of Time</u>	<u>Duties</u>
15%	Identification: Research, identify and qualify individual leadership, major and planned gift prospects. Responsible for being visible and “cold calling” prospects to reach goals.
35%	Cultivation/stewardship: Builds personal relationships with 200+ leadership, major, and planned gift prospects. Responsible for building connections that lead to meaningful solicitations and matching donor passions to the opportunities to impact students. Maintain detailed records of opportunities and donor interactions. Provide quality acknowledgement, recognition and reporting to maintain long term donor relationships.
40%	Solicitation: Personal fundraising gift goals set annually based on prospect lists and current campaigns. Responsible for developing strategies, preparing materials and creatively providing donors with specific information that lead to successful asks. Has clear knowledge and understanding of the university’s goals and programs. (If planned giving: Shares transformational nature of legacy gifts and the process to benefit family and university.)
10%	Other duties as assigned: for instance, support other functions of Foundation. Support programs that build donor relationships.
NA	Customer Service (internal and external). Interact regularly with faculty, students, and staff to gather information and develop messages for activities and campaigns. Be visibly and carry the message of the university to outside groups, especially to alumni and community leaders who will be assisting in achieving campaign goals.

**B. Required Qualifications:**

List any certificates, licenses, academic degrees, or experience **required** to perform the duties of this position. Indicate if a combination of education and experience is acceptable.

- Bachelors Degree or equivalent
- Minimum 3 years-experience in planned giving, fundraising or sales
- Some travel expected for professional training and donor visits, both via personal vehicle and plane/train.
- Ability and willingness to work evenings and weekends as needed

**C. Preferred Qualifications:**

Describe preferred education, experience, skills, licenses, certificates, and other qualification for this position.

- Fundraising experience in a university setting
- Experience with travel for professional purposes
- Experience implementing and maintaining a successful planned giving program
- Raisers Edge/RE NXT certificates
- Working knowledge of Crescendo

**D. Knowledge Areas:**

List the major areas of knowledge that are **required** to perform the duties of this position.

- Results oriented, with the ability to set priorities.
- Demonstrated success in securing financial resources of all kinds for non-profits.
- Excellent interpersonal, organizational, and communication skills
- Strong written communication skills; ability to write clear, structured, articulate, and persuasive proposals. Strong editing skills.
- Understanding the role of development and fund raising related to higher education and non-profits.
- Experience and dedication to work with Customer Relationship Management (CRM) software.
- Motivated, self-starter with ability to work independently and as a team.
- Relationship driven. (not transactional)
- Computer skills including knowledge of Microsoft Office and familiarity with databases
- Attention to detail.
- Ability to meet deadlines.
- Able to monitor and meet income goal.
- Knowledge of basic fundraising techniques, strategies and moves management.
- Knowledge and familiarity with research techniques for fundraising prospect research.
- Knowledge of fundraising information sources.
- Desire to continually improve and learn.

**With Planned Giving:**

- Working knowledge of gifting instruments (eg: bequests, annuities and trusts.)

- Marketing/cultivation planning for a robust planned giving portfolio

D. Budget Authority:

Indicate the level of the position's responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.

- Develops, monitors\*, and controls\*      \$ \_\_\_\_\_
- Delegated authority to monitor budget      \$ \_\_\_\_\_
- Limited approval authority for purchase \$ 16,500 \_\_\_\_\_
- Purchase only with higher level approval \$ \_\_\_\_\_

\*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level.

E. Supervisory Authority:

If this position has the authority to act or effectively recommend action affecting employees in the follow areas, check all that apply.

- Hire       Transfer       Discipline      -- Dismiss       Layoff       Promote
- Assign work       Recommend salary adjustments       Approve requests (i.e. leave)
- Respond to complaints/grievances       Conduct performance assessments
- Give direction

F. Positions supervised:

Number of Teaching Faculty	_____	Total FTE:	_____
Number of Classified Staff	_____	Total FTE:	_____
Number of Unclassified Staff	_____	Total FTE:	_____
Student Employees (average per term)	_____	Total FTE:	_____
Other (specify) _____	_____	Total FTE:	_____

G. Decision-Making Authority:

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department/university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.

- Determine the most effective messages and the means for carrying those messages to potential donors. Work with alumni in forming their messages in support of the university.
- Carefully analyze prospects' ability to give and determine the best way and time to ask for their support.

H. Additional Information:

List any additional information that would help describe the nature of the position. Attach appropriate Organizational Chart.

Position requires a mission-driven, curious, tenacious professional with the highest level of integrity, whom is relationship orientated and can work independently. Flexibility and resilience are essential.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

**Human Resources Use Only:**

Date Received: \_\_\_\_\_ HRS Signature: \_\_\_\_\_

FLSA Status:      \_\_\_ Exempt from overtime      \_\_\_ Eligible for overtime  
                             \_\_\_ Executive  
                             \_\_\_ Administrative  
                             \_\_\_ Professional

Comment: \_\_\_\_\_

Western Oregon University reserves the right to change this position description at any time.