

Position Description - Unclassified

Position Status:

| | | |
|---------------------------------------|-----------------------------|----------------------------|
| Position Title | | Position Number |
| Director of Philanthropy | | E99959 |
| Appointment (9mos. / 12 mos. / Other) | Contract Period (from / to) | Department / Division |
| 12 | 7/1-6/30 | Advancement |
| Position Type | | FLSA |
| Full-time | | Exempt |
| Reports to | | Reports to Position Number |
| Vice President of Advancement | | E99750 |
| Incumbent | | University ID # |
| | | |

Program Information:

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| <p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>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 create lasting opportunities for student success through transformative education and personalized support.</p> |
| <p>B. Describe the purpose of this position and how it functions within this program.</p> <p>The Director of Philanthropy serves as a key member of the Office of University Advancement and the WOU Foundation. Reporting to the Vice President of Advancement, the Director builds and manages a portfolio of prospective major and legacy giving donors. In addition to direct cultivation, solicitation, and stewardship of major donors and prospects, the Director provides marketing support for the estate and planned giving program.</p> <p>The Director is a key driver of major, planned and blended gift commitments to provide transformational and long-term support to Western Oregon University.</p> |

Position Information and Qualifications:

| A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Percent of Time | Duties |
| 50% | <ul style="list-style-type: none"> Develop and manage a portfolio of 75-100 prospects and donors capable of making five-to-six-figure gifts to Western Oregon University. Responsible for building personal and organizational connections that lead to meaningful solicitations and matching donor passions to the opportunities to impact students. <p>Design and implement custom engagement and cultivation plans, including working with board members, volunteer leaders and campus partners to discover new prospects and deepen relationships with existing supporters.</p> <p>Solicit and secure major and planned gifts, involving University leadership, faculty, and program staff, as appropriate. Promote the benefits of blended gifts, which include both an outright and estate gift component, to achieve greater and more immediate philanthropic impact.</p> <p>Produce well-written and timely correspondence such as comprehensive proposals, related budgets, and other materials in support of cultivating, soliciting and stewarding assigned prospects.</p> |
| 20% | <ul style="list-style-type: none"> Develop a multi-year plan to grow and market the planned giving program and reach goals for planned gift commitments. Create annual and long-term marketing plans, legacy donor profiles, and educational outreach meetings/seminars, materials and activities. Develop and maintain stewardship plans for individual families and donors, as well as recognition programs or legacy societies for all planned giving donors. <p>Participate in and share responsibility for effective use of Raiser’s Edge database to support timely and accurate documentation of planned gifts, along with all maintenance of donor data including visit reports and significant interactions.</p> |
| 20% | <ul style="list-style-type: none"> Collaborate with university leaders, faculty, and staff on fundraising strategy development and externally-facing activities; provide written briefings regarding assigned prospects and fundraising strategies. Educate internal and external constituents on opportunities for securing new donors and maintaining a robust planned giving expectancy pipeline. <p>Collaborate with colleagues and participate in general University Advancement and University programs and “all-hands-on-deck” events and activities.</p> <p>Support special fundraising events as assigned by Vice President.</p> |
| 5% | <ul style="list-style-type: none"> Perform other duties as assigned. |

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.

- Bachelor's degree.
- 3-7 years of major and/or planned gift fundraising experience, financial planning, estate planning, or related experience. Must be able to represent and act as a spokesperson for the University externally through in-person and virtual settings.
- Must maintain strict confidentiality of all constituent information and records.
- Must be willing to travel to attend in-person meetings with constituents within Oregon and out-of-state locations.
- Must be willing to work on evenings and weekends.
- Valid driver's license and personal transportation available for frequent travel to business meetings (mileage is reimbursed under federal guidelines).
- Successfully pass a background check.

C. Preferred Qualifications

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

- Fundraising experience in a higher education or nonprofit setting
- Experience and dedication to work with Blackbaud Raisers Edge Customer Relationship Management (CRM) software.

D. Knowledge Areas

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

- Demonstrate strong multicultural knowledge, awareness, and skills needed to perform the tasks of promoting diversity and social justice.
- Knowledge of best practices related to supporting a diverse student population, including students of color, students of diverse socioeconomic backgrounds, first generation students, students with disabilities, and other historically marginalized identities.
- Demonstrated success in securing major and planned gifts, or verifiable track record of soliciting individuals for financial investments and/or personally meeting fundraising goals.
- Knowledge of higher education development strategies and fundraising ethics and best practices.
- Experience managing and achieving quantitative goals and reporting regularly on performance in a metrics-based environment.
- Goal-oriented and self-motivated individual who can work independently and as part of a team.
- Ability to meet high standards of accountability, initiative, integrity, and focus in a rapidly changing and intellectually stimulating environment.
- Demonstrated success in working effectively with executive-level stakeholders, both internally and externally.
- Strong interpersonal skills and the ability to collaborate, build alliances, and achieve results with stakeholder groups that may possess competing interests or expectations.
- Able to solve complex problems and remove roadblocks to success.
- Excellent planning and organizing skills and ability to prioritize to meet deadlines.

- Must be able to represent and act as a spokesperson for the University externally through in-person and virtual settings.
- Exceptional communication skills (verbal and written).
- Ability to maintain strict constituent confidentiality and to manage sensitive information appropriately.
- Strong collaboration skills and demonstrated ability to effectively adapt to diverse audiences.
- Heightened orientation to detail and strong organizational skills.
- Proficiency in using fundraising databases. Proficiency and experience using Microsoft Office software, and an ability and willingness to learn new software if needed.

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. | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| x | Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i> | \$ |
| x | Delegated authority to monitor budget | \$20,000 |
| x | Limited approval authority for purchase | \$5,000 |
| x | Purchase only with higher level approval | \$ |

Supervisory Authority:

| If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply. | | |
|---------------------------------------------------------------------------------------------------------------------------------------------|------------|----------------------------------|
| <input type="checkbox"/> | Hire | Assign Work |
| <input type="checkbox"/> | Transfer | Recommend salary adjustments |
| <input type="checkbox"/> | Discipline | Approve requests (i.e. leave) |
| <input type="checkbox"/> | Dismiss | Respond to complaints/grievances |
| <input type="checkbox"/> | Layoff | Conduct performance assessments |
| <input type="checkbox"/> | Promote | Give Direction |

Positions Supervised:

| Type | # of Employees | Total FTE |
|--------------------------------------|----------------|-----------|
| Teaching faculty | | |
| Classified staff | | |
| Unclassified staff | | |
| Student Employees (average per term) | | |
| Other (specify) | | |

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 and/or 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.
- Schedule effective travel for budget and results.

Additional Information:

List any additional information that would help describe the nature of the position.

- Moves objects (less than 20 pounds) long distances (more than 20 feet).
- Ability to be mobile campus wide for appropriate business needs.
- Operates a variety of standard office equipment requiring continuous or repetitive arm-hand movements.
- Reading, writing, speaking, hearing, standing, bending, sitting. Learning and comprehending.
- Requires visual concentration on detail.
- Manual dexterity and precision required for keyboarding. Must be able to sit for long periods at a time at a computer
- May occasionally be required to deal with distraught people.
- Must be able to concentrate on details and process complex information while experiencing frequent interruptions.
- Must be able to communicate effectively with people at all levels under stressful conditions.
- Must maintain strict confidentiality relating to all issues in the department and Western Oregon University

Acknowledgement:

| | |
|--------------------------|---------------------------------------|
| Employee Printed Name | Employee Signature / Date |
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| Supervisor Printed Name | Supervisor Signature / Date |
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| Reviewer (VP / Director) | Reviewer Signature / Date |
| | |
| Appointing Authority | Appointing Authority Signature / Date |
| | |

HR USE ONLY:

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|------------------------------|----------------|---------------|---------------------|
| Received by | | Date | |
| | | | |
| Position Class # (Ex. UF101) | Employee Class | Job Location | Appointment Percent |
| | | | |
| CUPA-HR# / Title | NOC Code | Category Code | SOC Code |

| | | | |
|---------------|----------------------|--|--|
| | | | |
| Actions Taken | | | |
| | NBAPBUD / NBAPOSN | | |
| | NBAJOBS | | |
| | PEAFAC | | |
| | Electronically Filed | | |