

Job Information

Position Number: 297153
Job Title: Development Officer, Principal Gifts
Grade: NU04
Department: Office of the Chief Advancement Officer
Manager's Title: Director, Philanthropy
Month & Year: July 2023

Job Summary

Responsible to undertake principal gifts outreach and to manage relationships to raise funds to support university programs and services

Key Accountabilities

- Contacts potential donors to assess interest and provide information on programs and services to support participation
- Leads follow up from meetings, coordinates with the appropriate staff and university leadership to respond to questions, and addresses feedback and confirm gifts
- Develops scripts and tools to support contacts
- Coordinates and execute face-to-face qualification meetings including drafting of briefing notes, handling of logistics, and creating debriefing notes
- Solicits for university-wide priorities
- Answers range of questions on donations and charitable giving
- Records engagement results in database system, works with research staff to update alumni and donor records, coordinates to reduce overlapping contact, and track metrics
- Assists in facilitating strategies to engage a select group of leadership prospects to strengthen the relationships between potential principal gift donors and Carleton University
- Implements an appropriate cultivation and solicitation strategy for each Principal Gift prospect which includes drafting correspondence and proposals which are personalized for each prospect's financial situation and following through to completion of the gift or written commitment that the gift will be forthcoming
- Coordinates and executes select Principal Gifts fundraising meetings including drafting of briefing notes, handling logistics, and creating debriefing notes
- Provides support for the President's leadership group of influential alumni, political operators, donors and friends of Carleton to engage them, inform them and call upon them when required
- Advances the Principal Gifts agenda with Carleton's top prospects by equipping campus leaders with the information necessary to succeed in this area

Job Requirements

Core Knowledge, Education and Experience

- Knowledge of communications, public relations, marketing, and social media processes
- Knowledge of individual, corporate and foundation fundraising principles, changing philanthropic climate and techniques, and all types of donations, charitable giving, and fundraising instruments
- Knowledge of university's strategic priorities and goals as well as policies and procedures

- Knowledge of office as well as the broader university academic units, departments, and divisions
- Knowledge of office productivity software and databases, internet browsers and search engines, discipline-specific software, enterprise software, and technology devices
- Knowledge of cultural competency and diversity in a business context

Education

- Completion of bachelor's degree

Experience

- Minimum of four years of previous relevant experience in the related field

Communication and Stakeholder Management

- Translates university's advancement interests, makes compelling case, and encourages participation
- Builds relationship with prospects and maintains relationship across and between academic units, business departments, and external stakeholders
- Meets and interviews prospects, understands content and context, provides advice and guidance, and completes follow up correspondence and/or additional meetings
- Support and prepares briefing notes, executive correspondence, proposals, invitations, and marketing presentations

Problem Solving and Decision Making

- Works with autonomy in self-directed role
- Uses creativity to meet annual fundraising goals
- Determines priorities and actions based on previous experience, understanding the nature of the work and through reliance on policies, procedures, and processes

Impact

- Contributes to the reputation of the university through direct contact with potential donors
- Contributes to financial stewardship and revenue generation through fundraising and donations to the university
- Contributes to the accuracy and timelines of work unit deliverables, work product, and fundraising/advancement services

Leadership and Development of Others

- Familiarizes new employees with tasks, duties, practices, and processes

Physical, Visual, Auditory, and Concentration Demands

- Uses keyboards, mouse, computers/tablet, and other technology devices
- Responds to interruptions to workflow that impact concentration demands
- Concentration and visual effort during writing and data input, cross checks of information, and confirming accuracy

Working Environment

- Works in office environment
- Attends events and meetings outside of regular work hours, including travel