

Job Description

Job Title:	Development Officer, Annual Giving
Department:	Office of Advancement
Reports To:	Associate Director, Annual Giving
Jobs Reporting:	None
Salary Grade:	USG 9-11
Effective Date:	June 2018

Primary Purpose

The Development Officer, Annual Giving is responsible for the planning, implementation, development, and evaluation/reporting of select Annual Giving programs.

The Development Officer, Annual Giving has an operational responsibility for a variety of annual appeals, raising money through direct mail, email, phone, and personal visits. The Development Officer, Annual Giving will work cooperatively with the Leadership Giving team, Faculty and University College Development Officers, and Annual Giving team to ensure cross-program coordination and effectiveness, with a particular focus on building the donor pipeline.

Key Accountabilities

Revenue Generation & Relationship Building

- Manages and solicits prospects at Waterloo's Annual Giving levels (\$1- \$24,999) and works closely with the Leadership Giving Team, and the faculty/staff/retiree program in the execution of donor acquisition, renewal, and stewardship activities
- Develops and implements fundraising strategies for the annual telephone, direct mail, and electronic solicitations of select appeals
- Strategically identifies prospective donors to move through Annual Giving pipeline to Circle level, and from Circle to Leadership; develops and implements strategies to improve donor renewal and reduce donor attrition and default rates

Program Administration

- Plans and implements the overall cycle for Annual level donors including all qualification, cultivation, solicitation, and stewardship activities, requiring time spent analyzing and manipulating data in order to successfully implement mass solicitation methods
- Responsible for developing, managing, and reporting on annual budget and overall progress of assigned annual solicitation programs (including dollars raised, average gift, prospects reached, etc.)
- Manages correspondence and inquiries from alumni and donors, ensuring timely and appropriate response

Collaboration & Cross-program Coordination

- Provides functional direction to junior team members and/or co-op student(s)
- Some work with volunteers, as assigned
- Works collaboratively with the Senior Development Officer, Family Campaign to coordinate acquisition and renewal activity for Faculty, Staff, and Retiree prospects and donors

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- Ensures regular, open communication with Advancement Services teams (Alumni & Donor Services, Research, Systems, Donor Relations and Stewardship)
- Performs other duties as required

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

Education

- Completion of a Bachelor's degree or equivalent combination of education and experience

Experience

- 3-5 years of fundraising experience: solicitation and stewardship activities with specific experience in annual giving, relationship development, budget management, reporting, preferably in an educational or complex non-profit environment
- Management of direct mail/email/phone programs including segmentation and analysis of complex data
- Experience with Raiser's Edge or other fundraising database/CRM

Knowledge/Skills/Abilities

- Knowledge of annual giving strategies, trends, and best-practice
- Exceptional oral/written communication and relationship building skills
- Demonstrated ability to successfully identify and solicit support through personal visits and telephone conversation; knowledge of giving vehicles
- Exceptional interpersonal skills and ability to interact with volunteers and stakeholders
- A creative and innovative team player with excellent problem solving skills, strategic aptitude and sound judgement
- Ability to efficiently organize and manage a diverse range of assignments while meeting multiple deadlines, along with thorough attention to all details and consistent follow through
- Resourceful and independent while remaining comfortable working within the framework of a team-oriented environment
- A flexible schedule which allows for occasional after-hours events and meetings
- Intermediate-Advanced skills in Microsoft Office suite, particularly Excel

Nature and Scope

- **Contacts:** The incumbent works with the greater Office of Advancement teams, Faculties, Schools, and the Affiliated and Federated Institutions of Waterloo. Significant Internal Relationships: Associate Director, Annual Giving, Director, Development, Senior Development Officer, Family Campaign, Development Officers, Leadership Giving, Manager, Call Centre, Advancement Services Teams, Alumni Relations Team. Significant External Relationships: Alumni, Students and Friends of the University and Volunteers.
- **Level of Responsibility:** Responsible and accountable for the overall planning, implementation, development and evaluation/reporting of select Annual Giving programs.
- **Decision-Making Authority:** Overall program budget management; priority setting within larger program goals; handling of sensitive donor issues with sound judgement.
- **Physical and Sensory Demands:** Physical position is predominantly sitting in a comfortable position with frequent opportunity to move about. There is a frequent need to give close attention to various

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stimuli such as written material and information given verbally to co-workers. Travel between buildings will be required for meetings. Some travel will require use of car or university shuttle.

- **Working Environment:** Minimal exposure to disagreeable conditions; deadlines pressures with demand for thoroughness and accuracy typical of program administration responsibilities.