



# Job Description

(For Positions in CAW Local 555, Unit 1)

*Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.*

JD #:	<b>JD00602</b>	Pay Grade:	<b>9</b>
JD Title:	<b>Senior Development Officer</b>	JD FTE Hours:	<b>35</b>
Job Family:	<b>PR/Alumni</b>		

## General Description

The Senior Development Officer plays a critical role on the University Advancement team in the achievement of the principle objective of ensuring McMaster University’s current and future financial viability through the management of a program for the identification, cultivation and solicitation of potential donors and sustaining relationships with alumni, individual and corporate donors and community partners. The Senior Development Officer is responsible for securing significant and ongoing financial support for McMaster and consistently enhancing the pool of future donors to ensure growth in both the traditional and non-traditional revenue received annually by the University. As a key member of the University Advancement team, this position is responsible for making a positive commitment to University Advancement's mission, vision, values, and principles: Integrity, Quality, Respect, Service, Strategy and Teamwork. Due to the nature of this position, some evening and weekend work as well as travel is required.

## Representative Duties & Responsibilities

- Develop new strategies to build and maintain a competitive position for securing gifts and maximizing giving opportunities to enable the achievement of not only the Senior Development Officer’s financial and visit portfolio goals and broader Development operation goals, but also the overarching objectives of University Advancement and McMaster University. Experience in strategy development and implementation is required.
- Responsible for meeting ambitious financial and visit goals, set on an annual basis.
- Conduct major gift calls and visits to individuals, corporations, and foundations both independently and with faculty, staff, and volunteers. Excellent proposal writing skills are required.
- Oversee and manage the day to day operations of a diverse donor and prospect portfolio of significant individual and organizational donors and sustain a program of donor stewardship activities. Excellent interpersonal and relationship management skills are necessary. Experience working with ADVANCE is required.
- Work with a wide range of individuals such as students and Deans to corporate leaders investing in a professional chair and alumni contemplating a charitable bequest.
- Conduct prospect research to identify new potential donors such as individuals, alumni, corporations, foundations, and organizations.
- Remain current with post-secondary education activities and trends in demographics and giving activities in the corporate sector and advancement in the methodologies and vehicles of fundraising.
- Work closely with the department of Research within University Advancement as well as internal and external colleagues and volunteers to keep apprised of trends in giving, methods of identifying and evaluating potential donors and time sensitive opportunities as they arise.
- Identify and incorporate new and leading edge fundraising vehicles and methodologies throughout the development cycle from potential donor identification through to stewardship.
- Use judgement, tact, and sensitivity to secure funds for a variety of University priorities and to move donors through the donor cycle from discovery through to stewardship.
- Develop business plans to identify ambitious fund-raising goals for project and potential donor driven initiatives, ensuring full integration with other units within University Advancement and the Faculties, but also permitting latitude as unanticipated opportunities arise in a global and rapidly changing marketplace.
- Create dynamic and fluid action plans out of the business plans which focus on the achievement of significant dollar and donor acquisition goals as well as the ongoing stewardship of new and existing donors to ensure their continued commitment to the University.

## **Representative Duties & Responsibilities**

- Engage in the regular evaluation of efficiency and results of the plan, seek input from colleagues and share information of relevance to other fund-raising portfolios and activities.
- Interact and communicate consistently with key members of the internal community including, but not limited to, the President, Provost, Vice-Presidents, and Deans in order to ensure their appropriate involvement and awareness of fund raising activities. Excellent written and verbal communication skills are required.
- Represent Development, University Advancement and McMaster University to the internal and external community, including the international public, by being both informed, articulate and enthusiastic about the mission and work of the Institution.
- Facilitate meetings with internal and external constituents such as donors, allied professionals and volunteers. Experience managing volunteers is required.
- Provide information and advice to potential donors and existing donors regarding the implications of a gift on their financial and tax situation.
- Negotiate with donors and the appropriate University parties when drafting gift agreements and terms of reference.
- Monitor and report on a budget specific to the portfolio's budget needs and expenditures.
- Consult with both internal and external parties on specific policies and procedures relating to specialized portfolios.
- Actively seek out and analyze demographic, psychographic, and giving data as well as legislative information pertaining to charitable giving and effectively employ this information in the development of fund-raising plans and strategies.
- Establish relationships within the collegial network of fund-raising professionals and establish a presence as a participant in the profession by way of attendance at professional conferences and involvement in professional associations.
- Keep apprised of University initiatives, events, faculty and staff, policies and issues.
- Remain up-to-date and informed of activities within the international business community and industries with specific alignment to education such as information technology, communications and commerce.
- Gather, calculate, evaluate, and understand statistics related to donor giving patterns.
- Analyze and evaluate individual and corporate financial information for the purpose of determining net worth and capacity for donating.
- Apply business acumen to enable the development of tailored gift illustrations and proposals.
- Understand and interpret financial and legal and budget management information.
- Plan and coordinate a variety of events and expenditures in order to minimize cost and staff time and maximize existing University-wide and University Advancement opportunities.
- Write a variety of documents such as business plans, correspondence, contact reports, and briefing notes.
- Create gift illustrations indicating the benefit of matching donations at a variety of gift levels and pledge periods.
- Prepare and deliver presentations for both internal colleagues and external parties on a variety of subjects related to development and fundraising.
- Update, verify, and maintain all relevant information related to fund-raising activity both in hard copy and electronic formats and ensure that all information complies with University and provincial and federal policies and legislation.
- Participate, as required, in a leadership role in University Advancement activities such as small project teams that will be established for specific fund-raising initiatives.

## **Supervision**

- Provide lead hand supervision and is responsible for the quality and quantity of work of others.
- Manage volunteers and ensure adherence to quality standards and procedures for short-term staff.

## **Qualifications**

- Bachelor's degree in a relevant field of study. A McMaster degree is an asset.
- Requires 5 years of relevant experience.

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## Effort

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### Physical Effort:

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
  - Intermittent periods of keyboarding to word process documents, enter data into databases, and enter financial information into spreadsheets.
- A typical work day consists of up to 2 hours of moderate physical effort for activities such as:
  - Walking and standing at a variety of events and fundraisers.
- Elements of high physical effort are not a regular feature of this job.

### Mental Effort:

- A typical work day occasionally requires routine mental effort for activities such as:
  - Collecting routine information, word processing routine documents such as correspondence and reports, and inputting data in databases and spreadsheets.
- A typical work day consists of greater than 3.5 hours of moderate mental effort for activities such as:
  - Conducting major gift calls and visits to individuals, corporations, and foundations both independently and with faculty, staff, and volunteers.
  - Overseeing and managing the day to day operations of a diverse donor and prospect portfolio of significant individual and organizational donors and sustain a program of donor stewardship activities.
  - Working with a wide range of individuals such as students and Deans to corporate leaders investing in a professional chair and elderly alumni contemplating a charitable bequest.
  - Conducting prospect research to identify new potential donors such as individuals, alumni, corporations, foundations, and organizations.
  - Using judgement, tact, and sensitivity to secure funds for a variety of University priorities and to move donors through the donor cycle from discovery through to stewardship.
  - Negotiating with donors and the appropriate University parties when drafting gift agreements and terms of reference.
- A typical work day consists of up to 2 hours of high mental effort for activities such as:
  - Developing new strategies to build and maintain a competitive position for securing gifts and maximizing giving opportunities.
  - Developing business plans to identify ambitious fund-raising goals for project and potential donor driven initiatives.

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## Working Conditions

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### Physical Environment:

- There are no adverse physical environment conditions inherent to the job.

### Psychological Environment:

- Occasionally interacts with donors and potential donors who may be difficult and or challenging.
- Frequently handles competing fundraising requests and simultaneous deadlines.
- Results oriented environment where success is clearly measurable in terms of achievement against ambitious goals set on an annual basis.

### Health & Safety:

- Travels significant distances throughout the province on a regular basis to attend events and cultivate donor and potential donor relationships.

# Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	<b>JD00602</b>	Pay Grade:	<b>9</b>
JD Title:	<b>Senior Development Officer</b>	Total Points:	<b>599</b>
Job Family:	<b>PR/Alumni</b>		

Factor	Subfactor	Level Rating	Points
<b>Skill</b>	1. Applied Reasoning and Analytical Skills	<b>5.0</b>	105
	2. Breadth of Knowledge	<b>2.0</b>	13
	3. Adaptation to Change/Updating of Learning	<b>2.0</b>	12
	4. Interpersonal Skill	<b>4.0</b>	54
	5. Education and Experience	<b>E4</b>	104
	6. Dexterity and Coordination	<b>2.0</b>	12
<b>Effort</b>	7. Physical Effort	<b>1.0</b>	3
	8. Mental Effort	<b>3.0</b>	55
<b>Responsibility</b>	9. Planning and Coordination	<b>4.0</b>	64
	10. Responsibility for Others	<b>3.0</b>	55
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	<b>4.0</b>	93
<b>Working Conditions</b>	12. Physical Environment	<b>1.0</b>	3
	13. Psychological Environment	<b>2.0</b>	10
	14. Health and Safety	<b>2.0</b>	16