

Position Descriptions

UNIVERSITY OF CALIFORNIA, IRVINE

FOR USE BY APPROVING AUTHORITY:

Approved Payroll Title:

Approved By:

Effective Date:

CB Unit:

CB Code:

**UNIVERSITY OF CALIFORNIA, IRVINE
JOB DESCRIPTION**

Date: **June 1, 2001**

Incumbent: **Marguerite Brannon**

Title: **Development Director, UCI LIBRARIES**

Level: **MSP II Contract**

Supervisor: **Michael T. Losquadro
Executive Director of Development
University Advancement**

**Gerald J. Munoff
University Librarian**

I. Basic Function

Reporting to the University Librarian and the Executive Director of Development, the Development Director is responsible for the planning, executing, evaluating and acquisition of private support including corporate, foundation and individual major gifts for The Libraries.

II. Specific Responsibilities

1. Write a business plan for the establishment of a major gift development program, which includes foundations, corporations, and individual donors. The plan shall include quantifiable objectives.
2. Direct the organization, planning and implementation of volunteer committees or groups as may be appropriate and necessary to meet established fund-raising objectives.
3. Develop and oversee the planning, organization and implementation of prospect cultivation for assigned programs in The Libraries.
4. Enlist the involvement of the University Librarian and other senior UCI administrators in their contact with volunteers and other donor prospects.
5. Direct the planning of strategies and tactics for donor solicitation. Provide consultation and direction to the University Librarian in planning and marketing specific programs to specific funding sources.
6. Develop detailed gift opportunities tailored to the interest of potential major donors, consistent with the established needs and priorities identified by the University Librarian.
7. Prepare written case statements, proposals and/or other special materials for use during donor cultivation and solicitation.
8. Organize and direct donor solicitation involving key volunteers and the University Librarian and participate in major donor solicitations as appropriate.

9. Devise and oversee the implementation of methods for recognizing and maintaining regular contact with past donors to The UCI Libraries. Encourage the active participation of major donors as volunteers to ensure their constant awareness of current needs and objectives.
10. Supervise and direct the Associate Director of Development, University Libraries in his or her role.

III. Relationships

1. Work with the Executive Director of Development to coordinate fundraising campaigns or projects for The Libraries in accordance with campus and University fundraising policies.
2. The Development Director works extensively with the University Librarian and staff of The Libraries to define funding opportunities, develop funding strategies and their implementation, and to build and maintain communication throughout The Libraries.
3. Advise, inform and work with the Vice Chancellor/University Advancement, Chancellor's Office, Associate Vice Chancellor/University Advancement, Directors of Development, Division of Research and Graduate Studies and other campus departments.
4. Maintain effective working relationships with other departments in University Advancement: Communications, Special Events, Corporate and Foundation Relations, Gift Planning, Research, Finance and Administration, Alumni Relations and Annual Giving.
5. Participate in the campus prospect management system, development officer forums and University Advancement planning meetings.

IV. Scope

1. Responsible for fundraising and external relations budget.
2. Responsible for compliance with all UCI policies and procedures, including but not limited to, solicitation and acceptance of gifts, prospect management, special events, alumni and support group policies, and naming policies.

V. Knowledge and Abilities

1. Broad knowledge of the principles and practices of major gift fund-raising, preferably within a major research university.
2. Three to five years of successful fund-raising experience.
3. Ability to understand and to articulate the conceptual foundations of research libraries.
4. Understanding of academic, research and education functions and operating principles of a major research university.
5. Experience and skill in directing a complex development program within a major university and the ability to communicate effectively with a constituency both within the university and its community of supporters.
6. Ability to conceptualize, design and implement a development program. Ability to direct the design of strategies for cultivation and solicitation of donor prospects.

7. Ability to work effectively with deans and directors, academic and University leaders and volunteers to achieve fund-raising goals.
8. Ability to work effectively with other advancement staff in devising, analyzing, modifying, implementing and evaluating overall University Advancement program.
9. Skill in communicating persuasively, both orally and in writing, about private gift fund-raising in general and in particular as it applies to UCI and The UCI Libraries.

PROV #:

UNIVERSITY OF CALIFORNIA, SANTA BARBARA
JOB DESCRIPTION

Classified By:
Koeble, Roxanne

Decision Date:
09/27/2005

EMPLOYEE NAME:		EMPLOYEE ID:	NEW HIRE START DATE:		
APPROVED PAYROLL TITLE: DEVELOPMENT OFFICER II		TITLE CODE: 0602	WORKING TITLE: Director of Library Development and Outreach		RECLASSIFICATION EFFECTIVE DATE:
PERCENT OF TIME: 100	CBU: 99	ERC: A	GRADE TYPE: DO	GRADE: 2	FLSA STATUS: Exempt
APPT TYPE: Contract	DEPARTMENT/DIVISION: DEVL-Development		WORK LOCATION: 3589B Davidson Library		
NAME OF SUPERVISOR:		SUPERVISOR'S PAYROLL TITLE: Development Officer III		NAME OF DEPARTMENT HEAD:	

EMPLOYEE'S FORMER PAYROLL TITLE:				NAME OF PREVIOUS INCUMBENT:	
HR APPROVED ACTION: Update	TEMP BEGIN DATE:	TEMP END DATE:	LTD APPT BEGIN DATE:	LTD APPT END DATE:	END DATE (OTHER): contract - 9/30/06

TYPE OF SUPERVISION RECEIVED:
Direction

NAME OF EMPLOYEES DIRECTLY SUPERVISED:
Asst II, 100% (Library employee)

GENERAL SUMMARY OF DUTIES AND RESPONSIBILITIES:
This University Major Gifts Development Officer serves as Director of Library Development and Outreach ("Director") for the University Libraries ("Libraries"). Works to optimize philanthropic support for the Libraries, in response to academic priorities established by the University Librarian ("Librarian"). As a member of the Development Office staff, fund raising efforts are devoted primarily to the Libraries, with the remaining time to other University initiatives, as appropriate.

The Director focuses about sixty-five percent time on major gift (\$100k+) fund raising activities. Thirty-five percent is focused on other activities related to fund raising, including some lower level gift solicitations, liaison and programming with the Friends of the Libraries, development of campaign materials, assistance with programs and marketing materials for external and community relations, and administrative duties such as planning, coordinating and executing aspects of the Libraries development program.

With regard to major gift fund raising, the Director is responsible for designing and executing planned strategies for the identification, cultivation, solicitation, closing and stewardship of gifts from individuals, corporations and foundations. Works personally with top donor prospects and supports the Librarian, faculty and volunteers in top prospect relationships, in order to maximize philanthropic support for the Libraries and UCSB, raising gifts to meet identified fund raising priorities.

Director works to ensure that all aspects of his/her development program are internally consistent, thematically related, and compatible with the policies and priorities of the Libraries, Development Office and University.

JOB FUNCTIONS AND DUTIES

Listed below are the job Functions and Duties, both Essential and Non-Essential, listed in order of importance. Essential duties define the methods, procedures, and techniques by which essential functions are carried out. They show what is done, how it is done, and why it is done. Non-Essential functions are duties that are a peripheral, incidental or minimal part of the job. Removal of a Non-Essential duty would not fundamentally change the job.

The total percentage of all Essential and Non-Essential duties must add up to 100%, regardless of part-time status.

Order of Imp	Essen Duty	%	Freq.	Function	Duties
1	Yes	65	Daily	Fund Raising	<ul style="list-style-type: none"> identifies, cultivates, solicits, closes and stewards major gift prospects devotes significant effort to personal solicitations focusing primarily on major gifts meets individually with major gift prospects in and out of the Santa Barbara region supports and staffs the Librarian, and/or other senior administrators, as appropriate, in major donor prospect relationships including proposing planned strategies leading to gifts; briefings in preparation for development-related meetings; drafts or plans letters to donors

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

					<p>and prospects, comments for donor gatherings; and sets and coordinates individual meetings with many key gift prospects</p> <ul style="list-style-type: none"> • attends various meetings and University events, including some activities on weekends, evenings, and out of town, in order to cultivate or solicit donors • develops and manages volunteer involvement for the Libraries major gift fund raising effort, to the extent appropriate for the program, including working with Trustees of The UCSB Foundation Board
2	Yes	15	Daily	Community Relations	<ul style="list-style-type: none"> • serves as VCIA designate for development-oriented support groups for the Library • attend meetings of the board of the Friends of the Libraries, and works with the FOL President to foster the membership outreach and development potential of the FOL through programs, mailings, events, individual contacts and special projects • coordinates with appropriate staff to prepare and produce printed and electronic publications in support of the Libraries' fund raising and outreach efforts (brochures, mailings, press releases, web pages or other similar materials)
3	Yes	20	Monthly	Strategy and Administration	<ul style="list-style-type: none"> • creates a clear list of fund raising priorities for the Libraries, based on the Librarian's priorities • creates and executes a master plan, that includes an annual operating plan, expenditure budget and revenue goal, for development of private gift support for the Libraries, which, based on the Librarian's direction, prioritizes and coordinates the Libraries fund raising activity • manages an entertainment and travel expenditure budget for the program • initiates donor recognition and publicity, as appropriate (working in coordination with the Donor Relations and the Office of Public Affairs) • designs and executes tailored acknowledgments and recognition of large gifts (working in coordination with Donor Relations) • participates in various Development Office, Libraries or other University committees, or handles special assignments, as appropriate • collaborates with other college, school and unit based development officers, in particular in the context of the Campaign and collaborative academic programs and activities • supervises a full-time administrative assistant • completes other duties as assigned
4	Yes	0	Weekly	Reporting and Functional Relationships	<p>The Director reports to the AVC or designee and works as a member of the Libraries and Development Office staffs. The Director's program plan approval and performance evaluation are carried out jointly by the Librarian and the AVC or designee. The Librarian evaluates the Director's performance in areas such as knowledge of the Libraries' specific goals, case for support and fund raising priorities; ability to serve the Libraries' unique needs and proficiency in execution of the Libraries' fund raising plans. The Librarian establishes fund raising priorities. The AVC or designee evaluates the Director's performance in areas such as knowledge of the University's case for support, professional fund raising procedures, techniques and standards; achievement of fund raising and volunteer management goals as defined in the annual operating plan; and knowledge of and compliance with University of California, UCSB, and The UCSB Foundation policies, procedures and systems as these pertain to development. The Director coordinates with both the Librarian and the AVC or designee to establish an action plan, goals and priorities, and day-to-day activities.</p> <p>The Director's working relationships include a close, daily working relationship with the Librarian and the Libraries senior administrators and colleagues throughout the Development Office and Division of Institutional Advancement. The Director ensures coordination between fund raising for the Libraries, and other Development Office programs such as the development programs for other colleges, schools and units, the Annual Fund, Foundations, Corporations and Planned Giving; Prospect Research; Prospect Management & Tracking System (PMATS); Donor Relations and Stewardship; donor acknowledgment programs which support development, and other development-related units. Through this coordination, the Director ensures maximum and efficient use of the University Development and Institutional Advancement programs, to support the Libraries effort to raise gifts. The Director also interacts with faculty, administrative staff and the larger campus community.</p>

PHYSICAL, MENTAL AND ENVIRONMENTAL REQUIREMENTS

PHYSICAL
 Continuously=Activity occurs > 66%
 Frequently=Activity occurs 33% to 66%
 Occasionally=Activity occurs < 33%
 Not Applicable=Activity does not exist

On the job, the employee must:

Stand: **FREQ.**

Walk: **FREQ.**

Bend: **FREQ.**

Sit: **FREQ.**

Crouch / Squat: **N/A**

Kneel / Crawl: **N/A**

Climb: **N/A**

Reach Above Shoulder Level: **OCCAS.**

Use Keyboard / Mouse: **FREQ.**

HAND ACTIVITIES:

Fine Dexterity: **FREQ.**

Hand Twisting: **OCCAS.**

Simple grasping: **FREQ.**

Power grasping: **N/A**

Other:

Frequency of Other Activity: **No Response**

LIFTING ACTIVITIES:

Light lifting: **OCCAS.**

Moderate lifting: **OCCAS.**

Heavy lifting: **N/A**

PUSH / PULL ACTIVITIES:

Light pushing / pulling: **OCCAS.**

Moderate pushing / pulling: **OCCAS.**

Heavy pushing / pulling: **N/A**

MENTAL

Continuously=Activity occurs > 66%

Frequently=Activity occurs 33% to 66%

Occasionally=Activity occurs < 33%

Not Applicable=Activity does not exist

On the job, the employee must be able to:

Read/comprehend:

CONTIN.

Write:

FREQ.

Perform Calculations:

FREQ.

Communicate Orally:

FREQ.

Reason and Analyze:

CONTIN.

Other:

Frequency of Other Activity: **No Response**

ENVIRONMENTAL

Continuously=Activity occurs > 66%

Frequently=Activity occurs 33% to 66%

Occasionally=Activity occurs < 33%

Not Applicable=Activity does not exist

On the job, the employee:

Is exposed to excessive noise:

OCCAS.

Is around moving machinery:

N/A

Is exposed to marked changes in temperature and/or humidity:

N/A

Is exposed to dust:

OCCAS.

Is exposed to fumes:

N/A

Is exposed to gases:

N/A

Is exposed to radiation:

N/A

Is exposed to microwave:

N/A

CLASSIFICATION DESCRIPTION

THE GEORGE WASHINGTON UNIVERSITY

Issued: 03/05

Supersedes: Director of Development, The Gelman Library System (Issued 04/01)

FLSA: Exempt

Occ. Cat: 01

Code: 09BB

Grade: 24

Title: Director of Advancement, The Gelman Library System

Department or School:

Advancement and Alumni Affairs

BASIC FUNCTION AND RESPONSIBILITY

To work with the University Librarian and the Associate University Librarian in the identification, cultivation, and solicitation of major gifts for The Gelman Library System.

CHARACTERISTIC DUTIES AND RESPONSIBILITIES

1. Works with the University Librarian, Associate University Librarian and the University's Advancement Office to identify priority needs for major gift support.
2. Works with the University Librarian, Associate Librarian, and the University's Advancement Office to identify major gift prospects related to The Gelman Library System.
3. Works with the University Librarian, Associate University Librarian and the Vice President for Advancement & Alumni Affairs to establish programs for the cultivation of identified major gifts prospects, including visits by the University Librarian, Associate University Librarian or appropriate Gelman Library System staff members to social events, advisory boards and other efforts.
4. Makes personal calls, with the University Librarian or others, to solicit major gifts for The Gelman Library System.
5. Serves as a senior member of the University's Advancement Office staff and coordinates with other academic affairs advancement officers on prospect assignments and fund-raising strategy.

SUPERVISION RECEIVED

Administrative supervision is received on an as-needed basis from the Associate Vice President of Advancement, School Programs. Functional supervision is received from the University Librarian and the Associate University Librarian for Administration, Development and Personnel with regard to the priority needs for which support is to be solicited.

SUPERVISION EXERCISED

Administrative and functional supervision is exercised over the staff of The Gelman Library System Development Unit.

ENTRY-LEVEL QUALIFICATIONS

A Bachelor's Degree in Business Administration, Marketing (or a closely related field), or an equivalent combination of education, training and experience is necessary. An advanced degree is preferred.

A minimum of six years of fund-raising experience in major gifts and board development is necessary.

Experience in writing grant proposals is desirable.

The George Washington University is an Equal Opportunity/Affirmative Action Employer.

This description is intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct, and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

General Description:

The role of the Sr. Associate Director of Development is to represent the Sheridan Libraries while establishing and managing effective relationships with major gift donors. In this role, the Sr. Associate Director will serve as a major gifts fundraiser, identifying, soliciting and stewarding major gifts prospects. These prospects will primarily include individual donors who are capable of making gifts of \$25,000 or more.

Duties include: effectively represent the case for support of the Sheridan Libraries, manage a mixed (discovery through stewardship) portfolio of approximately 125 major gift prospects per year; manage 10-12 prospect visits/month; raise on average \$3M+ annually from major gift prospects; work collaboratively with colleagues in the Sheridan Libraries, other divisions, central development, trustees, volunteers, deans, faculty and senior administration to plan and implement fundraising strategies to meet campaign goals; manage the scheduling and arrangement of on-site and off-site meetings, luncheons, tours, visits, etc. with major gift prospects, manage the stewardship program for all major gift donors; responsible for utilizing the prospect data systems for prospect management.

Qualifications:

Bachelor's degree with minimum of 5-7 years of related experience with demonstrated success in closing major gifts and individual solicitations; must be highly motivated, goal-oriented self-starter who is comfortable with both qualitative and quantitative evaluation; must have strong oral and written communication skills and computer skills; able to manage multiple projects simultaneously and effectively; able to make independent decisions and use keen judgment, and work as part of an effective team securing the success of the library's development and alumni relations program.

THE UNIVERSITY OF MANITOBA
POSITION DESCRIPTION QUESTIONNAIRE

GENERAL INSTRUCTIONS

Complete all sections of the position description and type or print the final version. Use words that apply to both genders. Contact the Human Resources Department if you need assistance.

SECTION 1. IDENTIFICATION

NAME OF INCUMBENT: _____

PRESENT CLASSIFICATION (IF KNOWN): _____

TITLE OF POSITION: _____ Libraries Major Gifts Officer (full-time, permanent)

ADDRESS OR LOCATION OF POSITION: _____ Elizabeth Dafoe Library / Frank Kennedy Center

DEPARTMENT OR UNIT: _____ University of Manitoba Libraries / Department of Development

NAME AND TITLE OF PERSON

SUPERVISING THIS POSITION: _____ C. Presser, Director of Libraries / M. Hamilton, Dir. of Development

The Libraries Major Gifts Officer will report directly to the Director of Libraries regarding the achievement of the strategic fundraising plan and priority of work and will have development work overseen by the Director of Development. Will also receive guidance on development methodologies and related University of Manitoba policies/procedures and on accessing resources and professional development from the Department of Development.

SECTION 2. SUMMARY

This section is intended to be a capsule summary of the position and its relationship to the work unit in which it is located. Therefore, you may wish to complete it after completing Section 3.

A. **THE UNIT** (Briefly indicate the size, purpose and goals of the Faculty/School, Department and Unit. Start with Faculty or Unit; then move to immediate work unit. Include sizes of budget, staff, students, etc.)

The Department of Development at the University of Manitoba has the responsibility to support the University of Manitoba in fulfilling its academic, research and institutional aspirations by acquiring private funding from corporations, foundations, faculty, staff, students, alumni and individual donors as well as non-operating government support. University procedures provide that no fundraising project can be undertaken by a unit/Faculty/School without the knowledge and approval of the Department of Development. The Department of Development works in close collaboration with the Director of Libraries in this regard.

The University of Manitoba Libraries consist of eleven unit libraries on the Fort Garry Campus and one on the Bannatyne Campus, as well as nine satellite libraries. Together they contain over 2,000,000 volumes, subscribe to 9,000 serials, hold a variety of materials in microform and multimedia formats and provide access to both local and remote databases. The University of Manitoba Libraries continues to move forward in fulfilling its vision of being recognized as an essential resource for information within the university and the Province of Manitoba, providing an environment which fosters scholarship, creativity and learning. The Libraries objective is to support the university's teaching and research agenda by developing the collections, both print and electronic and provide access to the collections through technology and services in all of the libraries. The Departments of Development and Advancement Services support the development needs of all University of Manitoba Libraries.

The University of Manitoba's Department of Development oversees the following programs for all faculties, schools and Libraries:

- **Annual Giving Program:** The Annual Giving Program solicits gifts annually from alumni, faculty, staff, parents, students, friends and businesses. These gifts help to provide scholarships and enhance programs beyond what can be covered through operating grants and tuition fees, and are the foundation to the university's development program. The current AGP is responsible for approaching alumni of the University of Manitoba, parents of student currently attending the university and current university faculty, staff and students. Phone, mail, a combination of phone/mail, and peer-to-peer approaches are used.
- **Planned Giving Program:** Planned Giving is the process of designing charitable gifts so that the donor realizes philanthropic objectives while maximizing tax and other financial benefits. Such gifts tend to involve the transfer of accumulated assets that have been earned or acquired over a lifetime. For that reason, they usually require the donor's careful consideration of how the transfer of a gifted asset will affect his/her current financial planning and estate planning, so they are not spontaneous. These gifts may be deferred or outright. The most common deferred gift arrangements are bequests. Donors may also support the university through gifts of property, annuities, life insurance and charitable remainder trusts. The process necessarily involves consideration of the effect of various gift options on the donor's income and tax position and therefore professional advice is required in most cases.
- **Major Gifts:** Major gifts are solicited on a peer-to-peer basis. Potential major donors are identified, researched and cultivated, and then a solicitation is made by a volunteer and/or representative of the university. Prospects may include individuals, corporations, foundations and organizations.
- **Capital Campaigns:** Capital Campaigns are undertaken under the direction and approval of the University to raise funds for capital projects. The Department of Development is responsible for establishing the feasibility of the campaigns, creating the campaign plan, creating the marketing strategy, identifying prospects and soliciting prospects and donors, in consultation with the Deans, Directors and any advisory or campaign cabinets that are established to assist with solicitations. The Department of Development also provides all acknowledgement and recognition of capital gifts.

The University of Manitoba's Department of Advancement Services oversees the following programs for all faculties, schools and Libraries:

- **Research:** Identify and gather information on donor prospects and donors for all development programs.
- **Awards Coordination:** Facilitate the process of establishing an award at the University.
- **Database Administration:** Manage and maintain biographic data on all alumni, prospects and donors, and financial data on all donors and alumni.
- **Reporting:** Provide timely and accurate biographic and/or financial information regarding alumni, prospects and donors to staff (internal and external) and outside organizations or individuals, as required.
- **Gift Processing, Acknowledge and Follow-up:** Process all gifts to the University of Manitoba from individuals, corporations, foundations and organizations, and send the appropriate receipt and acknowledgement. Follow up with reminder notices as required.
- **Stewardship/Donor relations:** Faithfully and competently carry out the purpose of a gift and communicating to the donor the impact of the gift on the university as well as the appreciation for the gift.
- **Administrative Support:** Clerical and administrative assistance to support all of the development programs, including word processing, meeting and event arrangements, overhead preparation and assisting with preparation of mailings.

B. **THE POSITION** (Briefly explain: why this position exists, what it is intended to do, and how it assists in meeting the work unit's goals.)

The incumbent reports to the Director of Libraries for the content and priority of work and has work overseen by the Director of Development. The incumbent is part of the development team providing fundraising assistance to the University of Manitoba Libraries. The incumbent is responsible for the overall comprehensive fundraising plans and strategies for the Libraries and, in collaboration with the Director of Development, will ensure they are consistent with the University's fundraising goals. The intended result is increased outright and deferred gifts to the Libraries. This includes collaborating with staff in the Departments of Development and Advancement Services in planning, implementing and managing an annual giving program, a major gifts solicitation program for assigned prospects, a planned giving program and for maintaining a tracking and reporting system to manage the funds, donors and prospects for which the incumbent is responsible. Major responsibilities include: developing strategies and overseeing the fund-raising cycle, including prospect identification, cultivation, solicitation, recognition and stewardship. The position will receive stewardship and development assistance from the development team.

The incumbent, in collaboration with the Director of Development, works closely with senior corporate volunteers and individuals who are planning significant gifts to the University of Manitoba.

SECTION 3. KEY RESPONSIBILITIES AND DUTIES

Major development responsibilities in the Libraries include developing strategies and overseeing the fundraising cycle, including prospect identification, cultivation, solicitation, recognition and stewardship; acting as a liaison with and supporting the Director of Libraries. The incumbent also works with volunteers to identify prospects and raise funds for the Libraries.

The role of the Libraries Major Gifts Officer is to:

- As a key member of the Library’s development team, collaborate with the Director of Development to ensure that prospect clearance, management and strategies for the Libraries are properly managed.
- Identify, qualify, cultivate and close gifts in the \$25,000 - \$1.0 million range.
- Design and develop effective solicitation strategies and manage prospect relationships in a way that enhances continued and increased support to the Libraries.
- Organize time well, allowing for significant interface with prospects. The ultimate annual expectation is 50-75 face-to-face prospect visits, 30-50 solicitations and 20-40 closed gifts.
- Represent the University of Manitoba and its Libraries to the outside world and facilitate relationships between individuals, corporations, foundations and key members of the university, leading to significant gifts.
- Recruit, engage and support volunteers in solicitation work.
- Write persuasive, appropriate funding proposals communicating the Library’s plans, programs, services and initiatives for potential donors. Consult with the Department of Development for assistance when required.
- In collaboration with the Stewardship Officer, administer and steward each gift according to the donor’s wishes.
- Manage the tracking of all gift proposals.

The incumbent will be required to travel to some major centres and meet with donors. This involves flexibility in work hours, including evening and weekend work. The personal nature of these approaches and relationships requires that accurate records of all contacts and correspondence are maintained. Strict adherence to follow-up commitments, details and timelines is critical to the success of the program.

SECTION 4. SUPERVISORY RESPONSIBILITIES

1. Responsibility for the direction or supervision of employees: (YES or NO)
2. _____ Full-Time _____ Part-Time _____ Temporary _____ Casual _____ Students
number number number number number
3. Highest classification of employee supervised: _____
4. Nature of supervision exercised ("X" the appropriate description(s) and explain below)
(a) Hires [] (b) Recommends [] (c) Interviews [] (d) Trains [] (e) Evaluates Performance []
(f) Motivates [] (g) Disciplines [] (h) Assigns and Distributes Work [] (i) Other []

SECTION 5. SUPERVISION RECEIVED

What degree of supervision, direction or guidance does this position receive? Check the appropriate box.

- Detailed verbal/written instruction
- Standard practices, occasional referral to supervisor
- Considerable independence in choosing methods used to complete well-defined projects
- Significant independence in establishing practices and procedures and maintaining objectives
- Administrative guidance governed only by University policies and goals

SECTION 6. CONTACTS AND RELATIONSHIPS

<u>TITLE OF CONTACT</u>	<u>FREQUENCY</u>	<u>REASONS</u>
A. INTERNAL <i>(e.g. Deans, Admin. Assistants, etc.)</i>		
	<i>(Daily, monthly, regularly, etc.)</i>	<i>(To get information,</i>
Director of Libraries &	regularly	Content & priority of work. Plan, strategize evaluate activities
Director of Development	regularly	Oversight, direction and collaboration
Staff in Libraries	regularly	Secretarial & administrative support
Staff in Department of Development services	regularly	Collaborate on & obtain development
Staff in Dept of Advancement Services services	regularly	Collaborate on & obtain advancement
Stewardship Officer	regularly	Stewardship services
Development Assistant	regularly	Development assistance & support
Faculty in Libraries development	as needed	Obtain information related to initiatives
Vice-President (External)	as required	Reporting
B. EXTERNAL <i>(e.g. Govt. Agencies, Suppliers, Professional Organizations, Journals, Publishers, the media, the community, etc.)</i>		
Other universities in Canada & USA	as required	Receive and share information
Corps, Foundations, Organizations, etc	regularly	Cultivate and solicit
Volunteers	regularly	Supervise and oversee development service
Alumni, donors, prospects steward	regularly	Provide &/or gather information, cultivate,

SECTION 7. EQUIPMENT USED

(List only those major items that would contribute to an understanding of the complexity of the position and the percentage of time spent using them.)

<u>TYPE OF EQUIPMENT</u>	<u>PURPOSE IT SERVES (IF NOT OBVIOUS)</u>
Audio visual	For presentations
Personal Computer & mainframe terminal	To access records & generate reports
PC as connection to mainframe data	
Word processing	

SECTION 8. INDEPENDENCE OF ACTION

1. What decisions/actions does the incumbent make/take on own initiative? Give examples.
-Works independently to develop, plan and implement fundraising initiatives; determine prospective donors; approach agencies and foundations. Receives oversight from Director of Development as required.

2. What decisions/actions does incumbent share with others? Give examples.
-Incumbent is responsible for achieving the annual plan and meets with the Director of Libraries and the Director of Development on a regular basis to monitor progress, at which time adjustments are agreed upon.

3. What decisions/actions does the incumbent refer to others? Give examples.
-Donations from planned giving commitments that require special institutional approval or anything that may have financial implications for the Department of Development or the University.

SECTION 9. WORKING CONDITIONS FOR THE POSITION

In describing working conditions, assume a reasonable match between the incumbent and this position and address the question: How would most people describe these conditions?

1. Physical Effort
Provide examples of following types of physical effort, showing how much, how long, how often.
Lifting material:
Stretching, pulling, pushing:
Moving material:
Climbing, walking:
Working in awkward positions or circumstances:
Sitting or standing:
Manual dexterity:
Other:

2. Physical Environment
Office air tends to be stale.

3. Sensory Attention
Analysis of fund-raising statistics requires a considerable amount of concentration. Daily, but for short periods of time. Annually on a more in-depth basis. Strong attention and listening skills when meeting with prospects.

4. Mental Stress
Irregular work hours – weekly
Pressure of reaching fund-raising goals - continuous
Working with volunteers is demanding
Techniques and preparation of written resource material requires constant creativity - continuous

What control do you have over your work pace? Explain:
Responsibility for developing and implementing an annual development plan for the libraries, collaborating with the Director of Development, and reporting to the Director of Libraries.

Is the nature of your job repetitive? Explain:
NO

Is your lifestyle disrupted by work schedules or travel requirements? (Show how much, how long, how often).
- Working with volunteers requires early morning, noon and evening meetings
- Occasional travel is required for conference/professional development; travel is required to talk to major donors/leadership donors

SECTION 10. QUALIFICATIONS

NOTE: This section is to be completed as if the position were vacant, as it is used when preparing a position vacancy. The qualifications required in Section 10 must be consistent with the key responsibilities and duties assigned in Section 3. For example if Section 3 has assigned accounting responsibilities, then Section 10 must include a corresponding level of accounting training or experience. This will vary with the level of position from bookkeeping knowledge or experience to formal accounting designations.

MINIMUM FORMAL EDUCATION/TRAINING REQUIRED:
A university degree in a related field is required. An equivalent combination of education and experience may be considered

EXPERIENCE:
At least five years experience in fundraising, with an emphasis on major gifts solicitation is required. Experience with library fundraising is an asset. A proven record of successful fundraising is required. Successful experience working with the public is required. Experience in public speaking and making presentations is required.

SKILLS:
Basic skills with the current version of Microsoft Word and spreadsheet applications required. Experience creating PowerPoint presentations is required.

ABILITIES:
Excellent verbal and written communication abilities are essential. Demonstrated organization skills and the ability to work independently are essential. Demonstrate ability to guard confidentiality.

PHYSICAL REQUIREMENTS:
Physically capable of performing the duties as assigned. The position requires extensive travel; a valid driver's license and access to an automobile is essential.

OTHER JOB RELATED QUALIFICATIONS THAT MAY BE PREFERRED:
Evidence of satisfactory work record.

SECTION 11. SIGNATURES

I have read and understand this description of my position:

_____	_____
Employee	Date
APPROVALS	
_____	_____
Immediate Supervisor	Date
_____	_____
Department Head or Grantee	Date
_____	_____
Dean, Director, or Head of Administrative Unit	Date

MU Libraries Position Description

Title: **Director Development Fund, Position number c41202**
Working Title: Director of Development – MU Libraries
MU Libraries - Administration
Reports to: Director, MU Libraries

I. Summary Description

Direct and provide services in assessing, cultivating, soliciting, and providing stewardship to MU Libraries major and prospective donors.

II. Description of Duties

% Time A. Regular Duties

- % 1. In conjunction with the Libraries' Director, establish annual and campaign plans, goals and objectives for the Libraries development program and operating plans designed to facilitate achievement of these goals and objectives.
- % 2. Plan and execute major donor assessment, cultivation, solicitation and stewardship calls at the level of at least 250 annually.
- % 3. Assist and manage the operational details and implementation of policies, programs and techniques to raise private funds from alumni, friends, corporations, foundations and estates.
- % 4. Recruit, organize, supervise and motivate volunteer leaders to serve on development boards, committees and campaign organization for the purpose of raising private funds for the Libraries.
- % 5. Administer and supervise the daily activities of the development office in areas of budget, gift receiving (non-value) and management, donor research and relations, and volunteer leadership training.
- % 6. Develop and draft case statements, proposals, and solicitation appeals for use in fund raising.

Supervision Received

Direction is received from the Director of the Libraries and the Assistant Vice Chancellor for Development.

Supervision Exercised

Administrative supervision may be exercised over an assistant with duties in development and public relations. Administrative and/or functional supervision may be exercised on a shared basis over one or more office support staff. Functional supervision may be exercised over numerous part-time volunteer staff.

Qualifications

Bachelor's degree. 4-5 years in higher education fund raising management and alumni/volunteer relations management is necessary.

Preferred Qualifications

Experience in fundraising in an academic research library environment.

Major or significant coursework in communications, public relations, marketing or similar areas.

Demonstrated oral and written communications skills.

Demonstrated group presentation skills.

Demonstrated donor research skills.

Salary Range: \$42,595 - \$77,652

Special Notes: 40%-50% traveling.

Created: October 2000

c41202

EFFECTIVE DATE: 1 July 2005
REVISED:

Name:
Functional title: Director of Communications and Development

PRIMARY FUNCTION: The Director of Communications and Development will provide leadership, direction, and coordination for internal and external communications, fundraising and gifts, and staff development for the Heard Library. With guidance and direction from the University Librarian and the Head of Public Services, this position will work collaboratively with library staff, donors and the campus community to develop and maintain a coherent, shared vision and direction for the Heard Library.

MAJOR DUTIES AND RESPONSIBILITIES:

The Director will work in conjunction with the Head of Public Services to accomplish the fifth goal of the Library's 2005-2010 Strategic Plan, "Communications with Users." S/he will also work with system-wide teams to accomplish the staff development and communications goals. S/he will serve as a member of the Library's Strategy and Planning Council.

The Director will create, implement and evaluate a **publicity plan** for the Library to improve communication between our stakeholders and the Library and to make staff more aware of our users' needs and perceptions. S/he will work with a Communications Team to determine if a marketing plan is warranted. S/he will write and distribute the biweekly staff newsletter, the Monthly Report of the Office of the University Librarian and the minutes of the Library Management Council and the Faculty Library Committee, and provide oversight for other internal staff communications, including the Staffweb.

S/he will create, implement and evaluate a **development plan** for the Library to increase Library funding and to support special programs designated by the University Librarian. The Director will identify and cultivate potential donors for a future building program. S/he will provide oversight for the *Acorn Chronicle*, the Heard Library Society and the Friends of the Library. S/he will work closely with Special Collections to cultivate donors, solicit in-kind gifts, and steward donors to that department.

S/he will develop programs to train staff to improve their work-related skills as well as improve their working lives. We will make the Library a learning organization in which staff acquire new skills at an increased pace to keep current with technological change. At the same time, the **staff development program** will create opportunities for staff to come together to encourage collaboration across the libraries.

Supervisory Responsibilities:

The Administrative Assistant for Development will report to the Director. S/he will also direct a communications team and a staff development team to plan and implement those projects.

Budgetary Responsibilities:

The Director of Communications and Development works with the development team of Arts & Science to administer a development budget. She also administers the Friends of the Library budget.

COMMUNICATIONS:

Internal: Frequent contact with various departments, staff, and faculty members to exchange information. Tact and discretion are often involved.

External: Frequent contact with journalists and donors outside of Vanderbilt University to provide information. Tact and discretion are always involved.

Student/Faculty/Patron: Frequent contact with students, faculty, and library patrons to solicit input on needed services and service satisfaction. Communication of library programs and services must be effective.

The intent of this job description is to provide a representative summary of the major duties and responsibilities performed by staff in this job classification. Staff members may be requested to perform job-related tasks other than those specifically presented in this description.

