

**Title: Development Officer**

**Reports to: Director, Strategic Initiatives and Campaigns  
and  
Director, Major Gifts and Planned Giving**

### **Position Summary**

This is a split position of 40% *Major Gift fundraising* and 60% *Research and Prospect function*.

This position is responsible for working with the Major Gifts and Planned Giving team securing donations from donors and new prospects for gifts of \$10,000 and more. The incumbent is responsible for achieving individual annual revenue targets, as well as securing long-term pledges that will help ensure that the \_\_\_\_\_'s multi-year revenue targets are realized and that the goals identified in the \_\_\_\_\_'s Strategic Plan are achieved. As a member of the Major Gifts and Planned Giving team, this individual will be required to contribute to the development and implementation of a multi-year revenue plan.

The incumbent is also responsible for coordinating a comprehensive program of research on individuals, corporations, foundations, and organizations that are prospects for significant financial support of the hospitals. The incumbent is both proactive and responsive in expanding the pool of prospects with the greatest potential for the fundraising team. This position will also assist in revenue forecasting activities for the \_\_\_\_\_, updating reports for both staff and Board initiatives, as well as analyzing and modeling data related to various fundraising activities.

### **Scope and Responsibility Level**

The incumbent is expected to perform in a proactive manner, using independent initiative and drive for both their fundraising responsibilities within the Major Gifts and Planned Giving team and the prospecting and research function which supports the whole organization. As this position encompasses two separate areas of responsibility, the individual must apply their business experience in investigative research and proven donor or sales relationship development skills in conjunction with their superior multi-tasking and priority setting abilities. Both areas of responsibility command the incumbent exhibit a high degree of discretion and good judgment due to the complexity and confidential nature of the information within the organization.

The incumbent in their role as a professional fundraiser, will be responsible for managing a portfolio of prospects and donors through the complete cycle of identifying, qualifying and meeting prospects to determine their capacity and inclination to make major donations of \$10,000 or more to our hospitals, matching their interests with our projects, making the ask and then stewarding them through to the next gift. Using their relationship development skills learned from previous successful major giving fundraising experience or a career in a professional sales related function with a successful track record of achievements, the incumbent will partner with doctors and senior hospital leadership, as well as \_\_\_\_\_ volunteers including board members or other targeted committee members as appropriate during the fundraising cycle to seek out the appropriate resources to engage prospects. The incumbent's strong sense of discretion, professionalism and maturity are a requirement for dealing with people in highly sensitive and confidential situations. The incumbent's excellent verbal and written skills will enable them to

share with donors in simple and lay terms the complex and technical nature of the fundraising priorities of the \_\_\_\_\_. The incumbent is part of a collaborative fundraising team; however, they will also need to operate independently, showing personal initiative in managing their portfolio of donors and prospects. The fundraising or sales experience that the incumbent brings to this position will serve to help the \_\_\_\_\_ achieve organizational and fundraising goals.

To fulfill the research mandate of this position, this individual will apply their superior analytical and database management skills, including their knowledge and ability to create reports through report writing programs such as Crystal Reports. The incumbent plays an integral role in the ongoing statistical analysis required to measure the \_\_\_\_\_'s progress related to its strategic plan and must respond to numerous and evolving requests for reports. The incumbent will be responsible for generating a suite of multi-year revenue forecasts, and will be required to proactively manage this process based their own knowledge of the \_\_\_\_\_'s annual revenue and donor mix as well as input received from management. The incumbent's thorough and extensive knowledge of Raiser's Edge, the \_\_\_\_\_'s integrated donor management program, coupled with a facility with analytical modeling and great attention to detail will ensure the accuracy of these reports. Errors in content or poor compilation of reports could lead to badly formulated decisions by \_\_\_\_\_ management. Using their previous Major Gifts fundraising or relevant sales experience, the incumbent will provide research information to other members of the Major Gifts and Planned Giving fundraising team that is both pertinent and important in a successful approach to new prospects. The incumbent will be responsible for ensuring that the \_\_\_\_\_ adheres to all Privacy legislation requirements. The incumbent will also use their advanced project management skills and be able to prioritize the workload within this dual portfolio.

### **Reporting relationships**

The incumbent reports dually to the Director, Strategic Initiatives and Campaigns and the Director, Major Gifts and Planned Giving. The incumbent will have very strong day-to-day working relationships with all senior management, with each member of the Major Gifts and Planned Giving team, the Community Gifts team, the Donor Relations Officer, and the Director, Marketing and Communications.

### **Roles and Responsibilities**

#### **Key Responsibility Area: Fundraising**

- Initiates discussions and builds strong relationships with a diverse group of constituents including donors and potential donors.
- Partners with doctors, senior hospital and \_\_\_\_\_ leadership on fundraising initiatives to achieve the \_\_\_\_\_'s project commitments and annual revenue targets.
- Has a comprehensive and detailed understanding of the \_\_\_\_\_'s fundraising priorities and accurately conveys them to donors.
- Establishes rapport with donors, and easily communicates in lay language the complex, technical and diverse needs of the initiatives that the \_\_\_\_\_ is currently raising funds for.
- Works collectively and collaboratively within the Major Gifts and Planned Giving team as well as within the \_\_\_\_\_ to fundraise by identifying and qualifying prospective donors, cultivating positive relationships.
- Manages a portfolio of 40 donors and 25 prospects.

- Directly solicits donations \$10,000 and above.
- Engages in 2 face-to-face meetings with potential donors each week.
- Initiates proposals to match donor interests with appropriate needs of the hospitals and ensures they will suit donor needs.
- Understands donor wishes, providing accountability commitments to donors that are donor focused, achievable and appropriate for the continued stewardship of the relationship.
- Maximizes recognition opportunities, reflective of donor's expectations.
- Effectively manages donor moves and adheres to internal protocols and processes.
- Is responsible for written correspondence with donors and potential donors.
- Uses personal and professional networks continually to seek opportunities for partnerships in fundraising.
- Enters pertinent prospect and major gift information related to their donor portfolio into the \_\_\_\_\_'s integrated database, and handles all confidential donor information in a sensitive and ethical manner.

**Key Responsibility Area: Prospect and Donor research**

- Develops an annual plan to support the various work plans of each channel of giving, ultimately supporting the Strategic Plan for the organization.
- Develops and implements policies, procedures, standards, templates, and a research request system, methods, and rating formulas relative to prospect research to ensure consistency and quality.
- Proactively identifies new sources of funding (suspects) for the identified priority areas in addition to requests by fundraisers for additional areas and programs as well as \_\_\_\_\_ events.
- Keeps abreast of daily, weekly and monthly news publications to uncover timely information and effectively communicate all relevant information to \_\_\_\_\_ staff.
- Advocates the highest standards of performance and ethical behaviour related to prospect research and donor/prospect confidentiality. Supports the mission and ethics statement of the Assoc. of Professional Researchers for Advancement.
- Expands the pool of identified/researched major prospects and maintains accurate, up to date information on current donors and past major donors.
- Ensures the electronic database supports the research needs of the Development activities of the organization and ensures that pertinent research information is incorporated into electronic records.
- Enters and ensures the accuracy of all information input into Raiser's Edge, and produces the necessary reports that are required.
- Ensures that all Federal and Provincial Privacy legislation is adhered to when researching and entering all information. Educates staff on the Federal and Provincial Privacy legislation and ensures that the \_\_\_\_\_'s policies and procedures are up to date with current legislation.
- Coordinates and attends bi-weekly prospect meetings, preparing all necessary reports and materials as well as follow up materials.
- Creates any new reports that are needed for fundraising success using Crystal Reports, ensuring quality, consistency and effectiveness for the \_\_\_\_\_.

**Qualifications**

- Minimum five years experience in a not-for-profit fundraising environment as a major gift fundraiser, successfully securing donations \$10,000 and more, or the equivalent one to one sales experience with a high value product or service.
- University degree or equivalent diploma, ideally in humanities, business administration, the social sciences, or information management.
- Well-developed business writing skills with a demonstrated ability to succinctly provide useful and relevant information to donors.
- Mature, able to work independently.
- Well known for being a strong, positive team player with a collaborative work style.
- Thrives in a highly competitive industry and fast paced work environment.
- Familiarity with the philanthropic community in British Columbia and demonstrated/proven high levels of initiative.
- Knowledge of Privacy regulations, federal and provincial privacy legislation required.

### **Skills and Abilities**

- Fully developed professional sales or major gift fundraising skills and demonstrated ability.
- Superior verbal and written communication ability and skills.
- Highly developed interpersonal and relationship skills.
- Ability to multi-task and manage a variable and volatile workflow, which will involve multiple priorities.
- Strong attention to detail; highly developed recall and memory are definite assets.
- Familiar with a broad range of research techniques, including traditional text and periodical-based research, searching of electronic databases, interviewing, and the use of other sources such as court records, real estate data, the Internet, and census data.
- Excellent computer skills - proficient in Word, Excel, Outlook, and any desk top publishing software.
- In-depth knowledge of donor database management system Raiser's Edge including the ability to write queries is essential.
- Ability to perform database analytics and modeling, using report-writing capabilities with programs such as Crystal Reports.
- Proven exceptional ability to manage multiple projects simultaneously. Project management skills must be highly developed.
- Excellent analytical and organizational skills, with proven strategic talent and abilities.
- Excellent presentation skills.
- Scrupulous attention to matters of discretion when dealing with confidential and sensitive information.
- A proficient communicator, with an ability to draw out needs and issues from a diverse customer group.
- Entrepreneurial in spirit, while operating as a strong team player.
- Flexibility, able to easily respond to evolving requests.

### **Working Relationships**

#### **Internal**

1. Senior Management
2. Management within the Fundraising and Marketing group

3. Peer relationships with members of other teams

**External**

1. Donors and Prospects
2. Hospital Medical and Administrative Leadership
3. ??