

**CARLETON UNIVERSITY
POSITION DESCRIPTION**

PART A

Employee Name:

Title of Immediate Supervisor:

Director, Advancement Services

Position Title:

Annual Giving Coordinator

Department:

Department of University Advancement

OFFICE USE ONLY

1. Title:

2. Position 298885

3. Level: 08

4. Evaluated by: Date:

5. Approved by: Date:

PART B

Position Summary:

Reporting to the Director, Advancement Services, the incumbent co-ordinates Carleton's annual fundraising initiatives targeting alumni, parents, faculty, staff and students.

PART C

Primary Duties Performed:

1. Telephone Outreach Program and Student Philanthropy Association 40%

- Coordinates Carleton's Student Philanthropy Association which is responsible for promoting philanthropy on campus.
- Coordinates Carleton's Telephone Outreach Program which is responsible for raising \$150,000 annually.
- In these programs, the incumbent:
 - Recruits, trains, coaches, and mentors student staff.
 - Ensures functionality of hardware and software systems used including the Smartcall database and ThankView digital communications tool as well as Campaign Monitor.
 - Crafts telephone scripts with a specific fundraising strategy in mind, tailored to each audience, in addition to creating approved training manuals. Performs caller evaluations as required.
 - Coordinates the availability of data for the student work including appeals, special calling programs and SPA engagement efforts.
 - Submits student payroll forms.
 - Deals with constituent, prospect, and donor concerns and complaints in a timely and professional manner, escalating concerns to the Director.
 - Monitors campaign progress against the established fundraising strategies being used, and modifies daily strategies to be used when necessary.

2. Solicitation Coordination

30%

- Provides support for hundreds of analog and digital solicitations of more than 100,000 individuals who are responsible for giving \$1,000,000 annually.
- Along with the Director, maintains relationships with internal and external vendors for the purpose of discussing the design, production, and distribution of direct mail solicitation and stewardship pieces and oversees completion of in-house mailings.
- In consultation with Annual Giving Officers, prepares segmented data and ask amounts in order to effectively solicit and steward donors and prospective donors.
- Requests data to review, clean, and organize for email communications via Campaign Monitor.
- Provides input into overall annual giving fundraising strategy tactics.
- Creates digital templates in Campaign Monitor.
- Creates export data from online outreach platforms.
- Reviews direct mail and online communications and provide advice on content.
- Crafts responses to direct mail questions or complaints, elevating concerns to the Director.
- Produces ad-hoc thank you and acknowledgement letters.

3. Annual Giving Coordination

30%

- Creates and maintains the meeting, fundraising, and stewardship calendar and action items to ensure timely completion of activities.
- In consultation with Annual Giving Officers and Director, develops and implements strategies to maximize annual giving.
- Works with the Advancement Services team to ensure that the Banner Advancement and Smartcall databases provide data which is as accurate as possible.
- Mines the databases for potential prospect groups or segments for annual solicitations or research projects.
- Maintains database integrity by following up on address updates etc.
- Maintains Annual Giving wiki in DUAShare.
- Maintains Annual Giving libraries in DUAShare.
- Liaises with Communications for Future Funder requests.
- Upholds Canada's and Carleton's privacy legislation and policies, and makes process and policy recommendations to the Director, Advancement Services.
- Performs other duties as assigned.

PART D

Specifications (to be completed by supervisor in conjunction with employee)

1. KNOWLEDGE

a) Minimum amount of formal education required:

Completion of university degree program.

b) Minimum amount of relevant work experience required:

Three years of experience in a fundraising environment, preferably in a post-secondary institution and preferably with some experience in a call-centre program Two years of supervisory experience required.

c) Minimum amount and type of continuing study required:

The incumbent must maintain a current knowledge of trends and developments in the fields of annual giving and information management, particularly in terms of motivational, telemarketing and supervising methodologies and techniques. They must also maintain an up-to-date knowledge of our computer systems and their capabilities.

Elaborate on (a) and (b) justifying the amount of each specified above by detailing what the incumbent has to know and what skills are required of the incumbent in the performance of duties.

The position requires significant supervisory skills, including attention to detail, strong interpersonal skills, strong organizational project management abilities, and significant experience using databases and networked systems.

The duties of the position are diverse and varied and require the ability to oversee multiple priorities, stakeholders and tasks with minimum supervision.

The incumbent will be responsible for the success of vital fundraising initiatives and will be required to work some weekends and evenings.

The incumbent must also:

- Show well-developed interpersonal skills including the ability to function well in a multiple-team setting, prioritize, work independently and meet deadlines.
- Demonstrate excellent face-to-face and written communication skills.
- Handle confidential materials and situations with sensitivity and discretion.
- Possess advanced general computer knowledge of Windows and network-based environments, Microsoft Office and Banner Advancement.
- Demonstrate effective, creative and flexible research skills using online, print and database resources.
- Possess knowledge of general office practices.

2.COMPLEXITY OF DUTIES

The incumbent must be able to display initiative, organize priorities, handle diverse projects simultaneously and complete tasks to deadlines. A high level of interaction with donors and prospects, students, alumni, donors, faculty and staff require judgment and initiative. Accuracy and attention to detail are essential. Patience, skill and tact are necessary in dealing with alumni

and donors from all ranks and sectors capacities. All enquiries and complaints must be dealt with tactfully and knowledgeably.

A variety of problems of a unique nature are often encountered while the incumbent is supervising with students in the evenings which will require problem-solving skills and sound judgement. The incumbent must be enthusiastic, polite and professional at all times. Ability to work independently is essential.

The continuously high volume of work to be accomplished, which must be carried in a very timely fashion, coupled with the diverse and often-changing priorities, requires that the incumbent have strong organizational skills to carry out the strategies crafted by the Annual Giving Officers and Director, Advancement Services.

Supervising the work of more than 20 students each term requires experience, reliability, flexibility, adaptability, patience and a strong commitment to helping employees view the larger picture so they can better reach their potential.

3.ACCOUNTABILITY

There is an expectation from the university to raise annual funds for priority projects and to offset operational costs and to increase alumni giving and our national ranking. Therefore, the incumbent must use their own skills autonomously and exercise excellent judgement to procure an ever-greater share of this funding for Carleton University.

The incumbent must constantly display initiative and independent action to successfully meet annual goals with a minimal degree of supervision. Moreover, given current budgetary constraints, the annual giving program must be carried out in a highly effective, cost-efficient manner.

Errors or oversight can cause loss of goodwill and loss of income, or inability to reach our potential in terms of fundraising and friend-raising. Accomplished effectively, annual giving programs build interest and support and maximize our revenue generating potential.

Additionally, privacy and other legal compliance requirements place importance on this role to make important decisions independently every day with little to no time for consultation. A broad knowledge of the current rules and laws, excellent judgement and experience in this field are critical to success in this role.

4.NATURE AND LEVEL OF CONTACT

a) Purpose of Contacts

A large part of this position focuses on running the university's fundraising Telephone Outreach Program which requires significant oversight of student staff to ensure increasing returns.

In addition, the Annual Giving Coordinator deals with alumni, donors, parents, prospects, employees of the university and volunteers in the process of implementing. Supervises part-time

students and works with Advancement staff and cross campus partners to help implement Annual Giving initiatives.

b) Level (check one) - regular and continuous only and as specified in Part 'C'

- other employees in same work unit or office.
- the above plus students; faculty in the same work unit; or employees from other departments or offices at a similar job level to the incumbent.
- the above plus the general public, faculty and staff at a more senior level from other departments or staff at equivalent levels outside the university.
- all the above plus senior University executives and senior officials from government, private industry, other universities, etc.

5) SUPERVISION/MANAGEMENT CONTROL EXERCISED

a) Describe the type of supervisory/management control exercised. Indicate responsibility for overall direction of a section/department/unit either independently or through subordinate supervisors if applicable.

Supervises the work of 20 part-time student callers, student supervisors, SPA ambassadors and street team members including:

- Assigns and oversees tasks as required.
- Distributes work and checks for accuracy
- Gives advice and guidance on work patterns

b) Indicate the level of employees directly (not through subordinates) supervised.

- | | |
|--|--|
| i <input checked="" type="checkbox"/> primarily support | iii <input type="checkbox"/> primarily supervisors of (ii), or managers of section consisting of (i) employees |
| ii <input type="checkbox"/> primarily specialized technical, Administrative or journeyman trades | iv <input type="checkbox"/> primarily management level |

c) Indicate number directly supervised.

- 0 1-5 6 – 10 10 +

NOTE: Under the Occupational Health and Safety Act, the incumbent is required to be familiar with the Act and the regulations that apply to the work being performed in the work unit. The incumbent is also responsible for ensuring that individuals they supervise are aware of their rights and obligations under the Act.



Signed by:

Employee

Date

Approved by:

Immediate Manager

Date

Departmental Head

Date