



JOB FAMILY CONCEPT

This family consists of six levels of development work. Levels are distinguished based on the complexity of the work, level of supervision received, application of philanthropic concepts and the degree of autonomy. Positions in this family are responsible for performing fundraising services and maintaining relationships with donors and friends of the University. It is distinguished from the Administrative and Communication job families by utilizing and applying philanthropic fundraising theories, competencies and best practices. Positions in this family may perform administrative and communication tasks, however these functions are incidental while fundraising is the core objective of the job. Positions typically perform one or more of the following functions in support of a program or department.

- Annual Giving
- Planned Giving
- Major Giving
- Stewardship
- Corporate & Foundation Relations

TYPICAL FUNCTIONS

The typical functions listed are typical examples of work performed by positions in this job classification. Not all functions assigned to every position are included, nor is it expected that all positions will be assigned every typical function.

- Solicit gifts
- Communicate and foster long-term relationships with departments, donors, and prospective donors including alumni and volunteers
- Manage cultivation and prospect activities for major gift prospects and donors
- Ensure steadily increasing levels of support and create consistent movement toward higher philanthropic revenue goals
- Identify, research, and analyze how donors, volunteers, and related industry partners' resources and interests apply to University programs, its mission and priorities
- Develop, organize, administer, and evaluate operations and procedures for soliciting and maintaining donors' and potential donors' records
- Coordinate and/or manage the participation of volunteers, development staff and others in fundraising activities
- Prepare and execute annual work plans, procedures and policies
- Ensure compliance with applicable ethics, rules, laws, regulations, policies, processes and procedures
- Research and/or implement national best practices
- Assist, recommend and improve programs



- Assist in the development of processes, procedures and participate in the planning process
- Create, implement and assess programs, plans, protocols and strategies
- Create and implement marketing programs and strategies
- Responsible for short and long term plans, strategic direction and vision
- Identify financial needs of the organization and methods for achieving financial goals
- Identify, research and write grants to secure funding
- Define, develop and maintain budget
- Interpret, analyze and respond to daily requests for information from a wide variety of internal & external constituencies
- Utilize and analyze data to interpret information and design/produce reports
- Serve as advisor and resource for fundraising activities
- Serve as a strategic advisor to executive management
- Lead workgroups
- Supervise staff

LEVELS AND COMPETENCIES

The primary distinction between levels is reflected in the Level Descriptors. As levels increase, the scope, complexity, and degree of independence increase. Higher levels may perform duties of lower levels. Education and experience are stated at the minimum threshold for the level. Additional education or experience may be desirable for some positions.

Level 1
PCLS: 03401

Grade 77
Non-Exempt

Descriptors

Work is performed under intermittent supervision and within well-defined guidelines. This is the entry level which exposes incumbents to a variety of development functions in order to acquire familiarity and experience with fundraising activities and development functions. Act as a liaison with donors to provide routine technical information and provide advice on basic development policies and procedures. Assist in the creation of solicitation and/or stewardship materials, printed media and correspondence. Assist in the coordination of fundraising events. Participate in project and program activities. Perform research on donor information and provide data to donors and fundraising staff. Utilize data and prepare development reports and materials. Refer non-routine problems and issues to a higher level. Positions at this level are distinguished from higher levels by the closeness of supervision and the performance of routine development tasks requiring the application of standard procedures, techniques and criteria.

Knowledge, Skills, and Abilities

Working knowledge of development functional areas. Knowledge of computer applications. Problem solving skills. Verbal and written communication skills. Diplomacy, tact and ethical skills. Ability to



review documents for accuracy. Ability to understand and apply rules, regulations and policies as they relate to development functions. Ability to apply and understand routine development principles. Ability to establish and maintain professional working relationships. Ability to multi-task and meet deadlines. Ability to handle confidential and sensitive information.

Education and Experience

Associate's degree in communications, marketing, public relations, business, public administration or relevant field and one year of relevant experience or an equivalent combination of training and experience.

Level 2

PCLS: 03402

Alternative PCLS: *09410**

Grade 78

Non-Exempt

Descriptors

Work is performed under administrative supervision. Positions in this level proactively maintain relationships with existing donors to solicit gifts. Perform development functions that are small in complexity* and scope*. Assist in program development and strategies for fundraising. Assist in the implementation of recognition programs. Utilize data to synthesize information and produce complex reports. Coordinate and support development activities and special events. Identify, inform, research and qualify gift prospects through individual solicitation, cultivation and analysis. Assist in developing support materials for specific fundraising activities. May lead** students. This level is distinguished from level one by proactively soliciting gifts and assisting in implementing fundraising strategies and programs, and by the performance of professional development functions.

Knowledge, Skills, and Abilities

Same as level 1, plus: Knowledge of philanthropic support. Knowledge of applicable rules and regulations. Strong customer service/public relations skills. Strong verbal and written communication skills. Excellent organization and critical thinking skills. Networking, budgeting and research skills. Ability to be accurate, pay attention to details and operate in a confidential manner. Ability to create, organize, and analyze complex reports. Ability to establish and maintain effective working relationships. Ability to balance needs of donors with institutional priorities. Ability to represent the University with the highest degree of professionalism and positive public relations to all donor and friends at University sponsored and non-sponsored events. Ability to lead** students.

Education and Experience

Bachelor's degree in communications, marketing, public relations, business, public administration or relevant field and one year of relevant experience or an equivalent combination of training and experience.



Level 3

PCLS: 03403

Alternative PCLS: *09420**

Grade 79

Exempt

Descriptors

Work is performed under administrative supervision. This is the fully independent development professional level that is responsible for identifying, cultivating and soliciting gifts. Perform specialized work that is moderate in complexity* and scope*. Lead**, maintain and assess plan growth and components of fundraising strategies. Determine fundraising goals and manage the fundraising process. Lead** development activities including event support, administration and appeals to meet multiple fundraising goals. Track and maintain fundraising budget. Make recommendations for improvement and changes to plan. May lead** staff and volunteers. This level is distinguished from level two by the application of professional practices, increased independence to establish and cultivate relationships with donors, responsibility as a lead** and specialist for a development plan.

Knowledge, Skills, and Abilities

Same as level 2, plus: Demonstrated knowledge of philanthropic support. Demonstrated knowledge of fundraising and donor relations. Demonstrated knowledge and ability to apply rules and regulations. Knowledge of industry trends, best practices and technology. Exceptional verbal and written communication skills. Leadership and motivational skills. Strong networking skills. Project management skills. Budget skills. Ability to exercise judgment in analyzing situations and making decisions. Ability to lead** and motivate staff and volunteers.

Education and Experience

Bachelor's degree in communications, marketing, public relations, business, public administration or relevant field and two years of relevant experience or an equivalent combination of training and experience.

Level 4

PCLS: 03404

Grade 81

Exempt

Descriptors

Work is performed under general direction. Direct fundraising activities in a unit that is small in complexity* and scope* which typically occur within a department or college. Is considered an expert resource for a unit. Provide advice and guidance in specialty area to executives. Is responsible for soliciting gifts that are large in complexity* and scope* and/or managing a portfolio of major gifts. Work with executive-level stakeholders, corporations and boards. Conceptualize, implement and assess fundraising strategies to meet specific program needs, opportunities and annual goals. Participate in strategic planning for unit. Perform research and analysis of potential donors. Represent the University to various community organizations and individuals to build relationships for future gifts. Prepare and present appeals/requests to donors and personally solicit gifts for the unit. Manage cultivation and prospect activities for major gift prospects and donors. Assess how volunteer and donor resources and interests can apply and meet the unit's programs,



mission and priorities. Create, review and execute stewardship strategies for current donors. Responsible for program and/or department budget. Write and manage grants to secure funding. Supervise** staff and/or lead executive level volunteers including board members. This level is distinguished from level three by the responsibility for a major giving plan, serving as an expert resource for a unit and supervising** staff and/or leading executive level volunteers in a unit that is small in complexity* and scope*.

Knowledge, Skills, and Abilities

Same as level 3, plus: Advanced knowledge of philanthropic support, fundraising and donor relations. Moderate knowledge of industry trends, best practices and technology. Knowledge of individual's motivations to give philanthropically. Knowledge of program evaluation methodologies. Strong motivational skills. Supervisory** skills. Demonstrated ability in soliciting major gifts and success in fundraising. Ability to cultivate and solicit individuals based on their values, interest and motivations. Ability to provide sound advice to internal and external stakeholders. Ability to work with community leaders, and executives. Ability to develop and successfully execute strategic fundraising plans. Ability to apply research results for fundraising principles and strategies. Ability to conceptualize and assess fundraising goals and strategies. Ability to write grants and successfully secure funding as it relates to strategic mission.

Education and Experience

Bachelor's degree in communications, marketing, public relations, business, public administration or relevant field and four years of experience, or an equivalent combination of training and experience. Master's degree in relevant field preferred. Certified Fund Raising Executive (CFRE) certification preferred.

Level 5
PCLS: 03405

Grade 82
Exempt

Descriptors

Work is performed under general direction. Direct a fundraising unit and/or programs(s) that are moderate in complexity* and scope*. Analyze, conceptualize, plan and implement plans and goals to increase giving levels of potential donors while using strategic planning, and industry best practices utilizing a variety of vehicles that may include Major Gifts, Annual Giving, Planned Giving, Stewardship, Corporation & Foundation Relations. Participate in strategic and long-range planning for a unit. Create and maintain programs. Establish, maintain and enforce policies and procedures. Develop and foster long-term relationships with high level donors to create sustainability. Responsible for the fundraising program and its implementation. Responsible for ensuring compliance with applicable laws, regulations, policies and procedures. Project, develop and maintain budget. Identify, research and write grants to secure funding. Supervise** professional staff. This level is distinguished from level four by the responsibility for a fundraising program, developing policy, managing professionals in a development unit that is moderate in complexity* and scope* and increased independence to make decisions that may impact the program, department, MAU, or institution.



Knowledge, Skills, and Abilities

Same as level 4, plus: Knowledge of fundraising programs. Extensive program management and budget skills. Supervisory** and management skills. Ability to direct a moderately complex* unit involving multiple operations, projects and programs. Ability to recommend long-term and strategic plans. Ability to identify, research and write grants. Ability to develop policy.

Education and Experience

Master's degree in communications, marketing, public relations, business, public administration or relevant field and four years of experience, or an equivalent combination of training and experience. A Certified Fund Raising Executive (CFRE) certification is preferred.

Level 6

PCLS: 03406

Grade 83

Exempt

Descriptors

Work is performed under long-range administrative direction. Direct multiple components of a comprehensive fundraising unit that is large in complexity* and scope*. Positions at this level have overall administration and ultimate accountability for all components of a development program with significant impact at the MAU and/or system-wide level. Lead** the philanthropic development team including Major Gifts, Annual Giving, Planned Giving, Stewardship, Corporation & Foundation Relations. Identify financial needs and write proposals to secure funding. Plan, develop, and implement strategies and objectives to meet individual, MAU-wide and system-wide fundraising goals. Cultivate new donor relations by actively and aggressively building new relationships with prospective donors. Typically is a second line supervisor** who directs professional-level staff. Authorized to commit the organization to major expenditures and obligations. Ensure compliance with applicable laws and regulations. Research and maintain portfolio of donor prospects. Interact and strategize with senior leadership teams. Has full authority for development program/project management and policy development responsibilities. Oversee and monitor budget. This level is distinguished from level five by the responsibility of managing multiple and sometimes conflicting components of a development unit that are large in complexity* and scope* with MAU and/or system impact.

Knowledge, Skills, and Abilities

Same as level 5, plus: Extensive unit, MAU and system knowledge. Strong leadership skills. Ability to analyze, forecast and manage budgets with multiple or conflicting priorities. Ability to develop, implement and assess policies and procedures.

Education and Experience

Master's degree in communications, marketing, public relations, business, public administration or relevant field and five years of experience, or an equivalent combination of training and experience. A Certified Fund Raising Executive (CFRE) certification is preferred.



- * **Complexity:** Refers to the type and dollar value of gifts, fundraising goals, and number and type of prospective contacts positions have within their position, type of giving campaigns and size of the unit. Complexity also refers to the oversight of multiple fundraising plans within an overarching fundraising program or programs. It also refers to the higher level interpretation of and diversity of rules and regulations (e.g. Federal, State and university policies and regulations, state statutes and laws, and funding sources, contracts). Complexity increases as the application, interpretation, and frequency of working with these rules and regulations increases. Complex positions typically work with executives from corporations, boards, multiple departments, and campuses, have high fundraising goals, diverse gifts, supervise professional staff, lead executive level volunteers and are responsible for multiple fundraising programs. Complexity increases as positions more frequently work with these entities.
 - * **Scope:** Refers to the impact that a unit/department has on the University's ability to create a margin of success, the size of the organization, impact upon operating budget or contacts/stakeholders that the department may have. Positions with large scope have MAU or system wide impact.
 - ** **Lead:** Provide day-to-day guidance, training and direction for staff in addition to other duties. Regularly assign and review work. Fluent in assigned area of responsibility.
 - ** **Supervise:** Hire, train, evaluate performance, and initiate corrective action.
- ***Exemption status determined on a case-by-case basis. Essential functions of each job will be reviewed and evaluated in conjunction with the Fair Labor Standards Act.

[July 2009 revisions included formatting document for consistency.]