**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Advancement Services Officer

**Job Number:** A-267

**NOC:** 1123

**Band:** 8

**Department:** Advancement Services

**Supervisor Title:** Director, Advancement Services

**Last Reviewed:** May 28, 2019

**Job Purpose**

Reporting to the Director of Advancement Services, the Advancement Services Officer is responsible for researching, collecting and compiling profiles, briefings and proposal materials, as well as analytical research and reporting initiatives to support Development activities. The incumbent will be responsible for developing, implementing, and managing a prospect identification, tracking and reporting system (moves management),

The Advancement Services Officer also oversees and supervises the day-to-day activities of the Donations Office, with the primary goal of ensuring a continuity in data and analytics between gift records, campaign coding, proposal entry, donor records, and data available for campaign reporting.

**Key Activities**

***Prospect Identification and Research***

1. Qualify major gift prospects by researching and analysing their connections to Trent University, their giving capacity or potential, and their interest in Trent and its philanthropic priorities.
2. Devise strategies for identifying and acquiring new prospects to ensure the ongoing development, expansion and renewal of the university’s prospect base and pipeline of potential support.
3. Prepare detailed and current research briefings for Development staff, senior staff and faculty and senior volunteers, in advance of calls and events to maximize optimal outcomes.
4. Gather and concisely interpret relevant information in a variety of formats (electronic, print, etc.) in the development of research profiles and summaries.
5. Contribute to Development and Advancement Services plans in relation to information systems, processes and procedures pertaining to prospect and pipeline management, and other related infrastructure support services.
6. Scan media services to identify prospects as well as update existing key alumni and donor information.
7. Keep up to date on policy and regulatory changes, as well as current practices in the sector.
8. Trains and oversees the tasks of staff working in the prospect research area of the unit.

***Donations Office***

1. Oversees and monitors the daily tasks of staff working in the donation processing area of the unit to ensure timely and correct entry of all donations, as well as the issuing of receipts and donor communications; providing task support as required.
2. Ensures data entry results are correct and align well with campaign coding expectations, and proposal information.
3. Develops analysis to identify donors with additional capacity for prospect assignment.
4. Participates in inter-departmental fund allocations meetings with Advancement and Finance department staff as required.
5. Acts as primary point of contact for internal and external donation audits as required and ensures policies and procedures support a clean audit environment.
6. Identifies and implements process and procedure improvements to improve efficiencies in the donations area.

***Systems, Analytics, Administration, and Reporting***

1. Develop, implement and manage systems and procedures to proactively meet the information needs of advancement staff in preparation for contacting, cultivating, soliciting, and stewarding of major gift prospects (individuals, corporations, foundations, other).
2. Provide administrative support to the Director of Advancement Services in relation to systems development and management, infrastructure, and processes and procedures in relation to Advancement Services research, donations management, tracking and reporting.
3. Provide relevant administrative support to the major gifts team in the development of proposals, mailings and presentations.
4. Oversees and monitors moves management process, including communicating information to appropriate staff for action.
5. Provide leadership and direction to student team with relation to basic profiling, prospect research, and tracing contact information for key alumni and prospects.
6. Assists with the creation of Advancement Services reports, such as the Campaign Strategy Report and other benchmarking and activity reports.

***Prospect Strategy & Collaboration***

1. Regularly collaborate with the Director of Advancement Services and the Director of Philanthropy to develop prospect identification, cultivation, solicitation and overall fundraising strategies.
2. Participate in strategy meetings, providing information on prospect connections, capacity and interests.
3. Participate in discussions related to major gift planning to ensure effective mining of database.

***Collaborate on Other Assignments***

1. Provides support on special projects as determined by the Director of Advancement Services.

**Analytical Reasoning**

* Complex analytical reasoning is applied to research, interpretation and management of prospect and donor information.
* Examples;
* Assessing prospect giving capacity, areas of interest and links to Trent University
* Developing internal systems and processes to support the management of the above information
* Support strategy development for approaches to prospects and donors
* Ability to identify and establish complex transaction patterns and create meaningful donor activity correlations to other systems data in order to increase the likelihood of successful donor solicitations at higher levels.
* Examples;
* Correlating target analytics data to recent donations to identify further donor capacity
* Developing system reports which highlight existing donors prospect research has previously identified or flagging new donors for further research
* Complex analysis of data entry and problem tracing related to financial entries

**Decision Making**

* Complex decision-making on a daily-basis in all the areas identified under key tasks.
* Negotiation and decision-making with colleagues and stakeholders
* Experience, discretion, tact, and judgment are required.
* Complex system coding and development decisions
* Make critical reputational and relationship building decisions related to donor activity in difficult and sensitive situations

**Impact**

* Actions or decisions taken by the Advancement Services Officer impact upon the accomplishment of External Relations and university objectives
* Impact upon reputation of university with volunteers and community leaders
* Examples:
* Reputation & fundraising: incorrect information or interpretation will harm university and undermine campaign efforts
* Reaching fundraising objectives will depend on proper design and execution of research program

**Education**

Honours University Degree (4 year), ideally in Business, Library Science, Computer Science, Philanthropy, or a related research-oriented discipline.

CFRE designation and membership in APRA or AASP would be assets.

**Experience Required**

1. Minimum three years related experience in prospect research, development, library research or information related field preferably in a higher education environment. Knowledge of the range of resources available to prospect researchers and the ability to apply those resources in an organized and purposeful manner.
2. Demonstrated experience using the Raiser’s Edge system to process and maintain donations.
3. Demonstrated experience and understanding of charitable donation acceptance practices following CRA regulations.
4. Demonstrated analytical skills to initiate and perform complex analyses and organize information to identify philanthropic patterns, tendencies, and relationships among individuals, corporations and foundations. Ability to analyze and interpret complex financial disclosure documents for the purposes of wealth assessment (securities filings, real property files, financial and legal disclosures, etc.).
5. Demonstrated ability to conceptualize and develop proactive prospecting methodologies to support organizational goals, including data mining, sophisticated constituent database queries, etc.
6. Demonstrated background in Internet-based research.
7. Strong computer skills, including experience downloading and exporting information between systems and developing robust reports using such tools as SharePoint, SSRS, Crystal Reports, Tableau, or similar applications.
8. Experience working with a relational database is a necessity, preferably Blackbaud’s RE NXT or Raiser’s Edge, as well as the Microsoft Office suite of products, including Word and Excel.
9. Excellent oral and interpersonal skills, including diplomacy required to function effectively with major gift team, high level campus administrators, volunteers, student team and other constituencies to bring large scale projects to completion. Ability to work in a team environment.
10. Demonstrated ability to work independently, prioritize work, and independently manage multiple, diverse and competing priorities while meeting deadlines.
11. Strong project management skills and problem-solving skills and demonstrated ability to work in a demanding environment.
12. Ability to maintain confidentiality and work with sensitive information.
13. Ability to recall, recognize and communicate interrelated information pertaining to University benefactors and prospects.
14. General fundraising skills, including proficiency at supporting and participating in prospect management and tracking processes and staying informed of trends in the field.
15. Knowledge of ethics statements by APRA, AFP, and CASE.
16. Flexibility to work on occasional weekends.
17. Must be willing and able to travel locally, regionally, and occasionally nationally.

**Responsibility for the Work of Others**

Indirect Responsibility

Supervises the daily activities of the Donations & Research Assistant

Assists in leading student data team in relation to prospect systems management, profiling and research, data captures, and tracing constituent information.

**Communication**

Internal:

* With Development staff members: prospect identification, qualification & strategy; development of lists, research support and reporting
* Interaction with Advancement Services colleagues and providing leadership and guidance to student team in related areas of work
* Other colleagues within External Relations and Advancement
* With senior administrators and faculty in relation to prospect identification, research, strategy and briefings
* Other departments as required

External:

* Key volunteers, alumni and donors engaged in campaign
* Peers at other universities and within sector

**Motor/ Sensory Skills**

* Keyboarding & mouse manipulation - Computer usage impacts upon majority of responsibilities
* Driving - To attend internal and external meetings
* Dexterity/Coordination - Interaction at special events
* Hearing, speech and visual - remote and face to face communication, negotiation and presentations

**Effort**

Mental:

* Sustained concentration & focus - Research, strategy development – for content and prospects, proposal writing, prospect identification and qualification, systems function and development.

Physical:

* Long periods of time spent keyboarding, in meetings

**Working Conditions**

Physical:

* Long periods of time spent keyboarding, in meetings
* Support at, and in preparation, for major events (standing for prolonged periods, moving materials, etc.)

Psychological:

* Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks
* Flexibility to work occasional weekends
* Occasional travel expected
* Frequently deal with donor sensitivities and occasionally stakeholder complaints
* Stress imposed by quarterly and annual fundraising and program objectives