



## POSITION DESCRIPTION

Department:	University Development and Alumni Engagement
Classification Title:	Administrator III
Working Title:	Assistant Vice President for Development, Colleges and Units
FLSA Status:	<input type="checkbox"/> Non-Exempt <input checked="" type="checkbox"/> Exempt
Incumbent:	

### Position Summary

California Polytechnic State University (Cal Poly) is a nationally ranked, four-year, comprehensive public university located in San Luis Obispo, California. The emphasis of the University is a "Learn by Doing" educational experience for its more than 20,000 students. The primarily undergraduate student body is attracted to the University's commitment to small class sizes, hands-on learning, and an emphasis on student success.

The role of the University Development and Alumni Engagement (UDAE) Division is to foster strong relationships with internal and external partners while enhancing support for Cal Poly. UDAE establishes and implements an overall advancement program that includes alumni and parent engagement, community outreach, coordinated fundraising efforts, donor relations, gift processing, trust and endowment management, training and systems support for the donor database, and Cal Poly Foundation support and administration. Equity, Diversity, and Inclusion are core values at Cal Poly and UDAE is committed to a continuous process of learning and updating practices to support systemic evolution toward equity, diversity, and inclusion for our team and constituents.

The Assistant Vice President for Development, Colleges and Units will be responsible to provide leadership, direction, and oversee fundraising productivity for all colleges and units on campus. The incumbent will be responsible for collaborating with all Development Officers to foster a team approach in cultivating individual prospects. This position will carry a portfolio of major and principal gift level donors/prospects. The incumbent will actively fundraise on behalf of the University to create additional breakthroughs in philanthropy. This position will work with the lead gift officers and their teams to enhance the college/unit development operations efforts by providing resources to the colleges and units, with the focus on training Development Officers, increasing overall philanthropy to Cal Poly and growing the major gift pipeline. This position will report to the Associate Vice President of Development in the division of University Development and Alumni Engagement.

### Duties and Responsibilities

The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

#### Essential Job Functions

- |  | Daily | 90% |
|--|-------|-----|
| 1. Responsible for the management of college and unit-based Development Officers and their teams, in conjunction with their Appropriate Administrators.  |       |     |
| 2. Actively participates in the development and implementation of the Cal Poly Foundation Board of Directors by staffing the Development Committee. Responsible for producing quarterly reports and fundraising presentations to the Board of Directors. Coordinates development updates and presentations by deans, unit leaders, and other senior campus administrators for presentation to the Board of Directors at quarterly meetings of the Board. |       |     |

3. Develop and manage a personal portfolio of assigned number of prospective major prospects/donors, while maintaining confidentiality. Manage prospect, identification, qualification, cultivation, solicitation, and stewardship. Conduct assigned number of significant or substantive donor meetings annually. Submit assigned number of major gift proposals annually. Maintains a portfolio of prospects and donors and will cultivate gifts at the \$1,000,000 level in support of the University's priorities.
4. Develop and implement strategies and campaigns for solicitation of major (\$1,000,000 plus) gifts including determining ongoing relationships with prospects/donors; recommending specific purpose and level of gift; identifying those to be involved in cultivation and subsequent solicitation; and carry out solicitations.
5. In partnership with Prospect Management and Research and college/unit lead Development Officers, identify prospects, coordinate and execute visits, and report back to appropriate Development staff in order to properly develop a cultivation strategy for each qualified prospect.
6. Develop, lead and manage a team of high-functioning gift officers; make hiring decisions; provide coaching, training and mentoring; manage performance; and determine future hiring needs.
7. Support the University's overall Development efforts to increase dollars raised, donor counts and develop a process to qualify identified prospects to increase future major gifts.
8. Assist with principal gift strategies and solicitations to support the President, Provost, college Deans and Development Officers with their principal gift prospects.
9. In coordination and partnership with the central UDAE departments, develop and implement a plan to move constituents through the alumni engagement level to major gift donors.
10. Collaborate with college Deans, department heads and faculty to ensure effective communication and partnerships with alumni and prospective donors, and maintain an atmosphere of teamwork with various constituents.
11. Represent UDAE in collaborating with on campus constituents and leaders in an effort to achieve the fundraising goals of Cal Poly.
12. Ensure that the database of record is updated and reflective of cultivation, stewardship and other prospect management data.

**Related Job Functions**

**As Needed**

**10%**

1. Perform other job-related duties and special projects as assigned.
2. Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.

**Required Education, Experience, and Credentials**

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Education and Experience: Bachelor's degree and eight (8) years of progressively responsible experience in fundraising, with at least five (5) years of managerial experience.

Licenses, Certificates, Credentials: Possession of a valid driver's license or the ability to obtain by date of hire.

**Required Skills, Knowledge, and Abilities**

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1. Demonstrated ability to set achievable goals, develop strategic frameworks, establish effective metrics, and drive the successful execution of key programs with measurable results.
  2. Demonstrated ability to design, plan, and manage comprehensive fundraising plans to meet targets.
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3. Skilled leader who can inspire, lead day-to-day operations, encourage professional development of individual team members, and create high functioning team performance of accountable direct reports.
4. Ability to demonstrate sound judgement and multi-task in a complex and comprehensive university setting.
5. Expertise of all phases of fundraising, including principal gifts, constituency-based fundraising, major gifts, planned giving and regional fundraising programs.
6. Ability to negotiate positive outcomes in a politically and socially complex environment while maintaining strong relationships with all stakeholders.
7. Strategic knowledge of development best practices, trends, and innovations.
8. Exceptionally skilled at developing, cultivating, and maintaining major donors.
9. Excellent communication skills with all levels within and outside the University; and ability to effectively communicate information in a clear and understandable manner, both verbally and in writing. Thorough knowledge of English grammar, spelling and punctuation.
10. Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
11. Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the university with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
12. Ability to interpret, communicate and apply policies and procedures.
13. Demonstrated ability to maintain a high degree of confidentiality.
14. Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
15. Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.
16. Demonstrated ability to make sound decisions, even in the absence of complete information.
17. Ability to understand internal and external stakeholder requirements, expectations, and needs.

### **Preferred Skills and Experience**

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1. Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
2. Prior Higher Education, fundraising or Not-for Profit experience.
3. Demonstrated experience in data analysis, advanced analytical tools and databases relating to fundraising, prospect research, marketing or related field.
4. Master's degree in related field.

### **Special Conditions**

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- Must be willing to travel and attend training programs off-site for occasional professional development.
- Ability to travel on a regular basis both locally and on overnight trips from one to three consecutive days as much as 20% of the time.
- Must be able to work additional hours, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
- Perform work involving regular physical activity which may require the ability to safely move up to 50 pounds.
- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 Revised July 21, 2017 as a condition of employment.

- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position is a "designated position" in the California State University's Conflict of Interest Code. The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission.
- Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.
- This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

**INCUMBENT:** I have read this position description and understand its contents.

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INCUMBENT NAME	SIGNATURE	DATE
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**SUPERVISOR:** I certify that all statements on this form are complete and accurate.

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IMMEDIATE SUPERVISOR NAME AND TITLE	SIGNATURE	DATE
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**DEPARTMENT HEAD:** I certify that all statements on this form are complete and accurate.

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DEPARTMENT HEAD NAME AND TITLE	SIGNATURE	DATE
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**HUMAN RESOURCES USE ONLY**

Employee ID#: _____	REQUEST FOR:	CLASSIFICATION INFORMATION
Position Number: _____	<input type="checkbox"/> Update Review for File	Classification Title: <u>Administrator III</u>
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: <u>3306</u>
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: _____
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement Recruitment	MPP Job Code: <u>U-11-02</u>
<input type="checkbox"/> COI Position		Classifier Initials: <u>HR</u>
Recruitment Number: _____		Date: <u>7/22/24</u>