



POSITION DESCRIPTION

Department:	Orfalea College of Business – Center for Innovation & Entrepreneurship (CIE)
Classification Title:	Administrator II
Working Title:	Senior Director of Development
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 external partners while enhancing support for Cal Poly. University Development and Alumni Engagement does this by implementing 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 goal of the Cal Poly Center for Innovation & Entrepreneurship (CIE) is to open the world of entrepreneurial opportunity to Cal Poly students and faculty members and to promote entrepreneurial activity, scholarship, and dialogue across the university. This university-wide Center is designed to enable students to interact with faculty, with experienced entrepreneurs, and with each other in ways that will enhance their educational experience as well as strengthen ties between the California entrepreneurial community and Cal Poly while enhancing the university's historic strengths in technological innovation and economic development.

The Senior Director of Development will cultivate and solicit alumni, parents, friends, employers, foundations and corporations for contributions. The incumbent will direct the implementation and coordination of a comprehensive development program by identifying, qualifying, cultivating, and soliciting major gifts; understand and comply with the policies, procedures and best practices established by University Development; foster successful major gift fundraising by preparing university leaders to participate routinely and effectively in development activities and prospect appointments; and participate in college based programs that identify and encourage relationships with donors, prospects and alumni.

The Senior Director of Development reports directly to the Executive Director of Development and External Relations of the Orfalea College of Business (OCOB) and will work in collaboration with the Executive Director of the CIE, and University Development and Alumni Engagement. This job

involves planning and implementing short and long-term development initiatives for the CIE. This includes organizing fundraising and public relations campaigns that align with the college's mission and vision.

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. Develop and manage a personal portfolio of an assigned number of prospective annual and major gift prospects/donors, while maintaining confidentiality. Manage prospect, identification, qualification, cultivation, solicitation, and stewardship. Conduct an assigned number of significant or substantive donor meetings annually. Submit an assigned number of major gift proposals annually.
2. Develop and implement strategies for the solicitation of major (\$25,000 +) and principal (\$1M +) gifts including determining the appropriate ongoing relationships with prospects/donors; recommending specific purpose and level of gift; identifying those who should be involved in cultivation and subsequent solicitation; and carry out solicitations.
3. Under the direction of the Executive Director for Development and External Relations, participate in the planning process and execute the annual development plan. Responsible for personal and college metrics and goals that result from the annual development plan.
4. Develop written proposals for presentation to major and principal level donors, corporate sponsors, and foundations; develop gift agreements and confer with appropriate administrative personnel to secure closure of the gift; oversee accounting, gift recording and acknowledgement procedures and reporting; oversee compliance for in-kind gifts.
5. Work collaboratively with central University Development & Alumni Engagement partners including, but not limited to, Annual Giving, Planned Giving, Corporation Relations, Foundation Relations, Development Support Services, Trust and Endowments, and Parent Philanthropy on campaigns for solicitations.
6. Actively participant in and accountability for creating and executing a comprehensive stewardship plan to maintain positive relationships with external constituents including alumni and parent donors, industry and professional partners, and volunteers, such as CIE Advisory Council and Founder's Circle.
7. Work collaboratively with the Dean, CIE Executive Director, OCOB Executive Director, communications staff, and others to plan and implement donor and alumni-related public communication and marketing programs, including printed materials and websites, news releases, and coordination of internal and external publicity programs.
8. Plan, promote, and execute donor focused events. Attend all major fundraising events and representing the CIE in a positive light. Represent the Dean or Executive Director as appropriate and necessary through correspondence and in private meetings with donors and potential donors. Coordinate with department chairs, center directors, and faculty to ensure consistent and effective communication with alumni, parents corporations and foundations.
9. Prepare plans, reports, and other information to keep the Dean and the Executive Directors informed. Participate in strategy meetings and conversations on development opportunities, progress toward target metrics and goals, and problems encountered.

Related Job Functions

As Needed

10%

1. Perform other job-related duties and special projects as assigned.
2. Maintain currency in the knowledge and skills necessary to facilitate industry-leading solutions.

Required Education, Experience, and Credentials

Education and Experience:

- Bachelor's Degree and a minimum of six years of progressively responsible professional experience in development, major gifts fundraising, donor relations, marketing, planned giving or other related professional experience with four years being direct fundraising experience.
- Additional qualifying experience may be substituted for the required education on a year-for-year basis.

Licenses, Certificates, Credentials:

- Possession of a valid driver's license or the ability to obtain one by date of hire.

Required Skills, Knowledge, and Abilities

- Previous capital campaign, major gift cultivation and/or donor solicitation experience is essential.
- Demonstrated experience and success in major gifts fundraising, marketing, planned giving, or other related professional field, preferably in a university setting or other fast paced and dynamic environment.
- Demonstrated experience in developing and cultivating major gift donor contacts within the development community. Demonstrated experience in independent management of a large, complex, and successful, program with annual and multi-year goals.
- Thorough knowledge of and experience with prospect management systems, fiscal administration, and volunteer development including utilizing the alumni relations database and prospect management systems as organizational tools.
- Thorough knowledge of the financial structure of donations, to include cash, gifts-in-kind, stocks, and securities.
- Experience in record keeping, using principles of accounting, budgeting, etc.
- Experience in drafting complex proposals to corporations, private foundations, and individuals that include detailed goals, work plans and evaluative mechanisms.
- Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
- Demonstrated ability to interpret, communicate, and apply policies and procedures.
- Demonstrated ability to analyze information and data from a variety of sources and present information and recommend solutions.
- Demonstrated ability to use sound judgment, discretion, tact, and a willingness to take initiative.
- Ability to represent Cal Poly and University Development in a positive manner on campus and with external constituencies.
- Strong interpersonal skills and the ability to effectively interact and communicate with diverse constituencies both inside and outside the University, while maintaining a very high level of diplomacy and professionalism.
- Demonstrated ability to maintain high standards of conduct and confidentiality dealing with various internal and external constituencies.
- Ability to execute a complex fundraising program.

- Experience in working with a variety of internal and external stakeholders with competing priorities.

Preferred Skills and Experience

- Demonstrated skills in an institutional/educational environment, utilizing a customer-oriented and service-centered attitude.
- Master’s Degree in related field preferred.
- Fundraising experience in a higher education or similar development setting.

Special Conditions

- Must be able to successfully pass a pre-employment background/fingerprint check.
- Ability to travel on a regular basis both locally and on overnight trips from one to three consecutive days as much as 50% 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 as a condition of employment.
- 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.

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

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.

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: Administrator II
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 3312
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: M80
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement Recruitment	MPP Job Code: U-12-3
<input type="checkbox"/> COI Position		Classifier Initials: HR
Recruitment Number: _____		Date: 04/18/24