



POSITION DESCRIPTION

Department:	University Development and Alumni Engagement
Classification Title:	Administrator IV
Working Title:	Vice President for University Development & Alumni Engagement / CEO Cal Poly Foundation
FLSA Status:	<input type="checkbox"/> Non-Exempt <input checked="" type="checkbox"/> Exempt
Incumbent:	

Position Summary

California Polytechnic State University (Cal Poly), one of the nation's top public universities, seeks an experienced and entrepreneurial Vice President (VP) for University Development & Alumni Engagement (UDAE) / CEO Cal Poly Foundation to provide strategic planning, management, and execution of all business operations toward achieving an integrated university development program. The VP of the Cal Poly Foundation requires a business leader who is responsible for the leadership of the Cal Poly Foundation, a duly recognized 501(c)(3) public benefit non-profit corporation and auxiliary organization of the California State University System. The VP will serve as the CEO and a voting member of the Cal Poly Foundation and will work closely with the Cal Poly Foundation Board, Executive Committee, and Board Chair to advance the fundraising activities of the University in alignment with the responsibilities outlined below.

Reporting directly to the University President and participating as a trusted advisor and strategic partner the VP will serve as a member of the President's Cabinet and work with all other university constituencies, including the Provost and Executive Vice President, Senior Vice President Finance and Administration, Vice President of Research, Cal Poly Corporation CEO, Deans and Athletic Director.

The VP will lead an efficient, cohesive, and productive team, set clear and achievable goals and accountability measures, and inspire staff to meet and exceed expectations in support of the university's mission and vision. The VP will ensure strategies for effective and comprehensive business operations ensuring compliance, checks and balances and streamlined effective processes that support development. This includes finance, technology, annual giving, alumni engagement, principal gifts & gift planning, and campus operational, administrative, and financial controls related to gifts. In addition, the VP will provide management and oversight for core strategy development, large scale implementations, business transformation (lean process improvement/six sigma), change management, and new technology introductions.

The VP will carry a personal portfolio of donors and be an active and visible member in the local and University community. The VP will be responsible for developing a corporate giving strategy and implementation plan. Development officers have a dual report to the Dean/Academic Leader and the VP. They work in partnership to accomplish annual development goals, performance metrics, and conduct joint annual performance reviews.

The VP will launch systematic initiatives to identify and cultivate the next generation of donors to Cal Poly while maintaining and strengthening ties to existing donors, promote and augment alumni engagement through creative and relevant programming, seek out new philanthropic opportunities for cash gifts, endowments, bequests, grants, and gifts in kind. This individual will be involved with and nurture present industry stakeholders on state, national, and international

levels, play a key role in focusing state attention on the University's programs, and work with others across the institution to create a strong and consistent message about the University to its constituencies.

The VP will play a central role in enhancing the visibility and fundraising capabilities of the institution, ensuring Cal Poly's position at the forefront of public higher education. The VP will be actively involved in the initial stages and lead Cal Poly's third comprehensive campaign. The most recent campaign concluded in June 2020 and raised more than \$832 million, which at the time was the largest fundraising initiative for the university and in CSU history. The University is well positioned for the development of the next successful comprehensive campaign which will include generating support for scholarships, fellowships, program, project, facilities, and more.

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%
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Strategic Leadership

- Serve as the lead representative and advocate for the University Development & Alumni Engagement division on the President's Leadership Cabinet in matters such as strategic planning, budget, and key campus initiatives and partnerships.
- Develop and implement ambitious campus-wide goals, strategies, and metrics for development.
- Serve as the CEO and a voting member of the Cal Poly Foundation. As the CEO of the Foundation, supervise, direct and carry out Foundation business in accordance with, and subject to the control and direction of the Board.
- The CEO shall have such other powers and perform such other duties as are customarily vested in the CEO of a corporation or as the Board may from time to time determine.
- Oversee all phases of Cal Poly's comprehensive capital campaigns.
- Deliver change in a manner that is controlled and sustainable, is sensitive to the needs of various campus and Foundation stakeholders, engages and benefits these same stakeholders. Support the business development activities of the university, such as developing a research and development plan in collaboration with the Division of Research directed to Learn by Doing.
- Develop and implement an onboarding and training program focused on donor gift agreement details, specifically donor commitments for fund managers, UDAE staff, chairs, deans, and other impacted personnel.
- Evaluate divisional performance by analyzing and interpreting data and metrics; develop strategies to sustain optimal performance.
- Identify and cultivate sources of funding and represent the institution to high-level potential donors.
- Partner closely with university wide communications and marketing to facilitate advancement communications strategies.

People and Fiscal Management

- Develop and maintain strong rapport with faculty, staff, alumni, students and key donors and volunteers (i.e. Foundation Board leadership and members, members of advisory Board, Alumni Board, etc.) to elicit feedback for continuous improvement, ensuring organizational effectiveness and stakeholder engagement
- Foster collaboration with campus partners to achieve strategic objectives.
- Hire, lead, develop and retain a high performing advancement team and create a diverse, engaged and highly effective workforce.

- Model a culture of open and honest communication, respect, inclusion, integrity, balance, high achievement, and professionalism.
- Work closely with the Foundation Treasurer and Foundation Executive Director of Finance to manage the finances of the Foundation as a 501 c3. Set divisional budgets and manage resources effectively to maintain financial viability.
- Ensure compliance and continuous process improvement for advancement operations.

Related Job Functions

As Needed

10%

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

Required Education, Experience, and Credentials

Bachelor's degree in business, communications, public relations, or related fields.

A minimum of 10 years of progressively responsible experience as a leader or manager in development, advancement or fundraising in a large, multi-unit organization.

Required Skills, Knowledge, and Abilities

- Thorough working knowledge of principles of fundraising, trends, and best practices across industries.
- Working knowledge of the value of diversity and inclusivity across the university.
- Experience in organizational development and change management in complex organizations.
- See and translate future trends into effective strategies with successful outcomes.
- Financial and business operations acumen including budgets and fiscal goals
- Provide clear direction, delegating, and removing obstacles to get work done. Advocate for securing and deploying resources to achieve the best possible outcomes
- Lead by example and hold self and others accountable to clearly stated commitments.
- Operate effectively and efficiently in an environment of change and ambiguity. Political acumen including listening, negotiating and influencing to balance the needs of multiple stakeholders.
- Effectively communicating information in a clear and understandable manner to a variety of audiences.
- Successfully negotiating with vendors and managing contracts.
- Demonstrated ability to relate openly, collegially, and comfortably with diverse groups of people at all levels of the university
- Demonstrated ability to maintain confidentiality and securely handle highly sensitive information. Honesty, integrity, and authenticity.

Preferred Skills and Experience

- Advanced degree in business, communications, public relations, or related fields.
- Working knowledge of shared governance and other practices unique to higher education.
- Familiarity with policies and laws related to higher education (FERPA, ADA, etc.).
- Experience in complex public and diverse institutions.
- Capital campaigns and business transformation.

Special Conditions

- Must be willing to travel and attend training programs off-site for professional development and to represent the institution to high-level potential donors and cultivate those relationships

through outside donor engagements, athletic events, and donor visits domestically and internationally.

- 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.
- 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.
- Must be able to successfully pass a pre-employment background 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).

HUMAN RESOURCES USE ONLY

Employee ID#: _____	REQUEST FOR:	CLASSIFICATION INFORMATION
Position Number: _____	<input type="checkbox"/> Update Review for File	Classification Title: Admin IV
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 3300
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: M80
<input type="checkbox"/> Temporary	<input checked="" type="checkbox"/> Replacement Recruitment	MPP Job Code: U-21-A
<input checked="" type="checkbox"/> COI Position		Classifier Initials: AT
Recruitment Number: _____		Date: 10/20/2023