



Resources

Implementation Worksheets and Tools

TOOLKIT

4

Sample MGO Job Description

Instructions

This resource provides a sample job description for a MGO at a community college.

Job Summary

Under the Foundation Executive Director, the Major Gift Officer leads the identification, cultivation, solicitation and stewardship of individuals at major donor giving levels. Portfolio constituents will include alumni, faculty/staff and retirees, community friends, and Foundation volunteer leadership, among others. This is a pivotal development position on the Foundation team, working collaboratively with all Foundation staff in growing major gifts and moving identified supporters from annual giving circles up to endowment level gifts (\$25,000 and above). Gifts can focus on a range of fundraising priorities, from greatest need and scholarships to targeted support for innovative student success and program initiatives.

Responsibilities/Duties

- Manages a portfolio of prospective and current major donors with measurable outcomes for activities. This includes meeting metrics for qualifying, cultivating and soliciting significant contributions in support of the College's and Foundation's mission and vision.
- Sets up, facilitates, devises strategies for and holds face-to-face meetings with major donors in promoting the college and identifying donor philanthropic interests, sharing giving opportunities, and closing of gifts. Works closely with the Operations Team in particular database services and annual giving in advancing major donor relationships, driving new/renewed giving, coordinating gift arrangements and documentation, and overseeing stewardship of assigned donors.
- Advises and provides advance preparation for college leadership (e.g. College President, Associate VP of College Advancement, Campus Presidents), volunteers (Foundation Board or committee members), Development Director, and faculty/staff for donor meetings in which they participate. As such, talented communication skills (written, verbal, and presentation) and relationship building abilities are essential. The Major Gift Officer will also prepare donor and event briefings, talking points, proposals, and correspondence.
- Develops ideas and implements stewardship steps to creatively recognize individual major donors in ways that reflect the Foundation brand, mission, and vision.
- Maintains accurate and timely records/contact reports of all interactions with donors utilizing fund raising database and other tracking sheets. Analyzes donor data and giving trends as needed to grow contributions.
- Inspires and maintains positive relationships and communications with Foundation and Advancement colleagues to strengthen donor relationships and philanthropic giving to the college. Functions as a resource and supporting team member on Foundation and Advancement events.
- Perform other duties as assigned.

Sample MGO Job Description (cont.)

Minimum Qualifications

Bachelor's degree in business, non-profit management, marketing, social sciences or related field(Relevant experience may substitute for the degree requirement on a year-for-year basis). Five years of professional level fundraising experience in a higher education institution or non-profit setting.

Knowledge, Skills, and Abilities

- Knowledge of effective major donor fundraising techniques and practices.
- Knowledge and skills in organizing successful fundraising and major donor cultivation events.
- Knowledge of volunteer management techniques.
- Knowledge of Association of Fundraising Professionals code of ethical conduct.
- Strong interpersonal skills for building lasting donor relationships.
- Excellent verbal and written communications skills.
- Strong computer proficiency in using standard software programs and fundraising databases and utilizing database reports for donor analysis.
- Positive attitude and collaborative style that fosters workplace excellence and collegial staff support.
- Ability to work with an ethnically and culturally diverse population.
- Ability to prioritize and manage multiple donor meetings and relationships at varying stages, always driving to deepen donors' connection to the institution via philanthropy and other engagement with the College.

Work Environment

Standard office environment. Recurring early/late hours (weekend/early morning/evening meetings). Minimal physical exertion required.

Preferred Qualifications

- Five or more years of experience in major gift work-ideally with individuals with high giving capacity-in a higher education setting or in a large nonprofit organization.
- Demonstrated basic knowledge of planned giving.
- Experience with a capital campaign is desirable.
- Expertise in raising funds for a diversity of opportunities, including, but not limited to, scholarships, greatest need, academic or career technical programs, and special initiatives.
- Demonstrated ability to manage a prospect portfolio, meeting determined metrics for donor contacts, face-to-face meetings, and proposals submitted and funded.
- Versatile verbal, presentation, and written communications skills, to be regularly utilized for proposals, reports, and correspondence.
- Experienced in using Raiser's Edge (or another platform the College uses).
- Preference for CFRE (Certified Fundraising Executive Certification)

Sample MGO-Events Manager Job Description

Job Summary

Under the Foundation Executive Director, the Major Gift and Events Officer leads the identification, cultivation, solicitation and stewardship of individuals at major donor giving levels and maintains responsibility to plan and execute major events on campus. Fundraising portfolio constituents will include alumni, faculty/staff and retirees, community friends, and Foundation volunteer leadership, among others. This is a pivotal development position on the Foundation team, working collaboratively with all Foundation staff in growing major gifts and moving identified supporters from annual giving circles up to endowment level gifts (\$25,000 and above). Gifts can focus on a range of fundraising priorities, from greatest need and scholarships to targeted support for innovative student success and program initiatives. The other half of the role is dedicated to the support of high-quality events on and off campus. This role requires coordination between office staff, internal stakeholders, external vendors, and event attendees. The role maintains one administrative support officer, a fundraising and events coordinator who will support this position.

Responsibilities/Duties

- Manages a portfolio of prospective and current major donors with measurable outcomes for activities. This includes meeting metrics for qualifying, cultivating and soliciting significant contributions in support of the College's and Foundation's mission and vision.
- Sets up, facilitates, devises strategies for and holds face-to-face meetings with major donors in promoting the college and identifying donor philanthropic interests, sharing giving opportunities, and closing of gifts. Works closely with the Operations Team in particular database services and annual giving in advancing major donor relationships, driving new/renewed giving, coordinating gift arrangements and documentation, and overseeing stewardship of assigned donors.
- Advises and provides advance preparation for college leadership (e.g. College President, Associate VP of College Advancement, Campus Presidents), volunteers (Foundation Board or committee members), Development Director, and faculty/staff for donor meetings in which they participate. As such, talented communication skills (written, verbal, and presentation) and relationship building abilities are essential. The Major Gift Officer will also prepare donor and event briefings, talking points, proposals, and correspondence.
- Maintains accurate and timely records/contact reports of all interactions with donors utilizing fund raising database and other tracking sheets. Analyzes donor data and giving trends as needed to grow contributions.
- Maintains advancement master calendar to coordinate all major event planning. The successful candidate will also manage the Events and Fundraising Coordinator.
- Prepares all logistical aspects of the annual gold outing and donor appreciation dinner.
- Perform other duties as assigned.

Minimum Qualifications

Bachelor's degree in business, non-profit management, marketing, social sciences or related field(Relevant experience may substitute for the degree requirement on a year-for-year basis). Experience in a higher education fundraising setting preferred; candidates with events management experience preferred.

Knowledge, Skills, Abilities

Event management, fundraising, communications, prospect research, time management, social media.

Sample MGO-Annual Fund Director Job Description

Job Summary

Under the Foundation Executive Director, the Major Gift and Annual Fund Officer leads the identification, cultivation, solicitation and stewardship of individuals at major donor giving levels and also successfully manages the Annual Fund Program and staff. Portfolio constituents will include alumni, faculty/staff and retirees, community friends, and Foundation volunteer leadership, among others. This is a pivotal development position on the Foundation team, working collaboratively with all Foundation staff in growing major gifts and moving identified supporters from annual giving circles up to endowment level gifts (\$25,000 and above). Gifts can focus on a range of fundraising priorities, from greatest need and scholarships to targeted support for innovative student success and program initiatives. The Annual Fund aspect of the role is secondary, but no less important.

Responsibilities/Duties

- Manages a portfolio of prospective and current major donors with measurable outcomes for activities. This includes meeting metrics for qualifying, cultivating and soliciting significant contributions in support of the College's and Foundation's mission and vision.
- Sets up, facilitates, devises strategies for and holds face-to-face meetings with major donors in promoting the college and identifying donor philanthropic interests, sharing giving opportunities, and closing of gifts. Works closely with the Operations Team in particular database services and annual giving in advancing major donor relationships, driving new/renewed giving, coordinating gift arrangements and documentation, and overseeing stewardship of assigned donors.
- Advises and provides advance preparation for college leadership (e.g. College President, Associate VP of College Advancement, Campus Presidents), volunteers (Foundation Board or committee members), Development Director, and faculty/staff for donor meetings in which they participate. As such, talented communication skills (written, verbal, and presentation) and relationship building abilities are essential. The Major Gift Officer will also prepare donor and event briefings, talking points, proposals, and correspondence.
- Develops ideas and implements stewardship steps to creatively recognize individual major donors in ways that reflect the Foundation brand, mission, and vision.
- Maintains accurate and timely records/contact reports of all interactions with donors utilizing fund raising database and other tracking sheets. Analyzes donor data and giving trends as needed to grow contributions.
- Establish and support an annual fund team largely staffed by student employees. Successfully deliver Annual Fund goals each quarter to the College Foundation.
- Perform other duties as assigned.

Minimum Qualifications

Bachelor's degree in business, non-profit management, marketing, social sciences or related field (Relevant experience may substitute for the degree requirement on a year-for-year basis). Experience in higher education fundraising preferred.

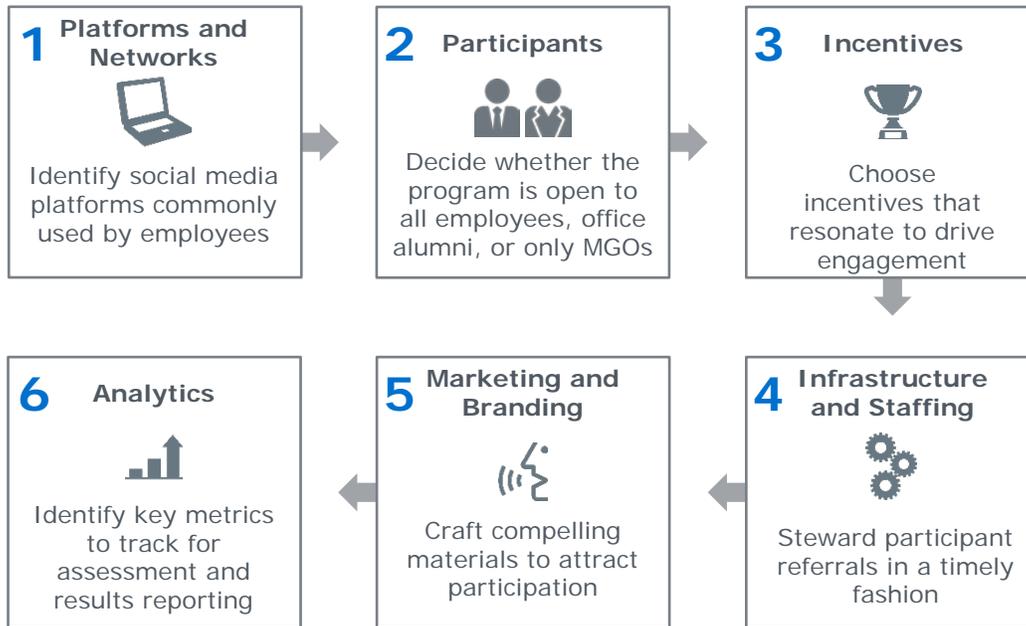
Knowledge, Skills, Abilities

Fundraising, annual giving, communications, direct mail solicitations, social media.

Social Media Referral Campaign Strategy Guide

Instructions

This resource outlines **six steps** to establish a social media referral campaign. These campaigns surface top talent in your employee networks and help fill staff vacancies. While often centered around a specific skill, competency, or position (e.g., MGO), the practices outlined below can be applied to many subunits within your division.



Step One: Platforms and Networks

Correspond with your hiring team to identify what social media platforms will gain the most traction at your organization. While some campaigns span multiple platforms, others concentrate their efforts on a single platform. Options to consider include:

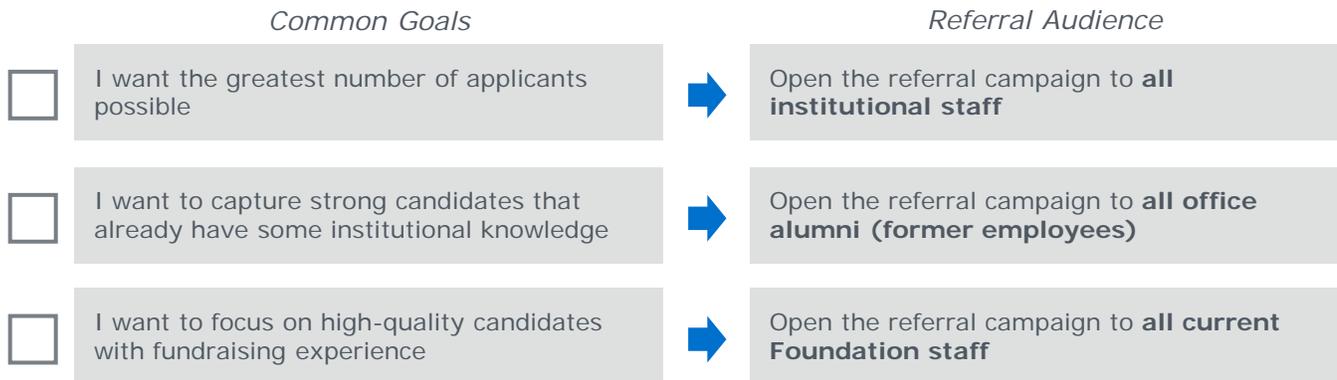
- LinkedIn
- Facebook
- Twitter

In order to execute on the campaign it will be important for your division to partner with central HR or marketing and communications to ensure you meet all internal social media branding requirements and build on their established expertise.

Social Media Referral Campaign Strategy Guide (cont.)

Step Two: Participants

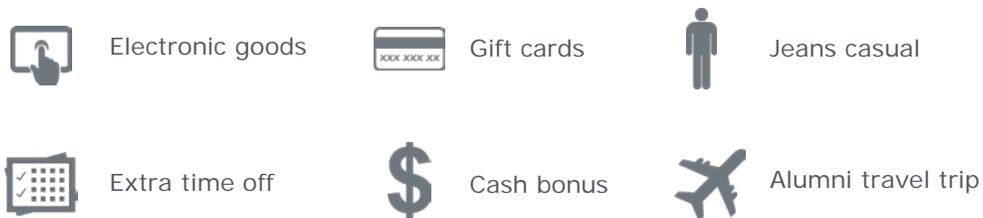
The next step in launching a successful campaign is to identify which staff you want to engage in conducting outreach. Key questions to consider:



Step Three: Incentives

To incentivize employee participation in the referral campaign, you and your team should consider offering participating employee incentive awards. Awards could be given for the entire unit or just to an individual. They might include “soft incentives” (e.g., jeans casual days or additional time off), a monetary reward, or commercial goods (e.g., an iPad).

Potential Incentive Offerings



Source: EAB Interviews and Analysis.

Social Media Referral Campaign Strategy Guide (cont.)

Step Four: Staffing

It is important to identify a staff member in the advancement division to serve as the campaign coordinator to ensure a successful social media referral campaign. We suggest a staff member in strategic talent management, a hiring manager, or a volunteer. The individual should be well versed in college HR policies, detailed-oriented, and able to manage high email volume. Of course, social media experience is also highly desirable.

Potential Manager Name	Relevant Skills

Step Five: Branding and Communication

The staff member who has been identified in step four is responsible for marketing the program to the referral campaign audience in a way that encourages participation. The campaign coordinator should send an email to inform employees of the campaign and list appropriate resources. An example email template is included below.

Dear Employee,

It is with great enthusiasm that the VP for Advancement announces the launch of INSTITUTION's first-ever employee referral campaign. As you know, we are about to launch a new campaign and need to staff up. To do that, we need your help. Please reach out to people in your network with **fundraising, communications, and leadership skills**, and invite them to consider applying for a position at INSTITUTION.

To promote all relevant jobs we suggest that you use the hashtag **#institutionjobs** on Twitter or post the following link (www.advancementjobs.institution.edu) on relevant LinkedIn pages to encourage people in your networks to send their résumé.

Referred individuals will be asked to provide the name of the person they know in the office. The staff member who passes the most leads will receive a free trip through our alumni travel program. Additionally, the team that refers the most candidates will receive half-day Fridays across the months of July and August.

We will update you in two weeks to announce the leading units and individuals!

If you have any questions, please do not hesitate to contact us at referrals@institution.edu

Sincerely,

VP Advancement or ED Foundation

MGO Competency Definitions

Instructions

This list of competencies has been compiled and defined through a series of research interviews with two-year and four-year foundation directors and institutional leaders (e.g., President). It aims to provide a set of behavioral skills that an individual fundraiser might exhibit in his or her daily work. These competencies may explain high performance in fundraising.

List of Competencies

- **Adaptability-** Changes behavioral style or method of approach when necessary to achieve a goal; adjusts style as appropriate to the needs of the situation. Responds to change with a positive attitude.
- **Collaboration-** Develops cooperation and teamwork while participating in a group (e.g.: other MGOs, service line leaders, physicians, donors, board members and volunteers, etc.), working toward solutions which generally benefit all involved parties.
- **Continuous Learning-** Demonstrates eagerness to acquire necessary technical knowledge, skills, and judgment to accomplish a result and to perform job more effectively.
- **Drive for Results-** Demonstrates concern for achieving or surpassing results against an internal or external standard of excellence, and is motivated by the achievement of quantifiable results. Shows a passion for improving the delivery of services with a commitment to continuous improvement.
- **Effective Communication-** Creates an atmosphere in which timely and high-quality information flows smoothly up and down, inside and outside of the organization; encourages open expression of ideas and opinions. Effectively transfers thoughts and expresses ideas orally, verbally in individual or group situations.
- **Emotional Intelligence-** The ability to perceive, understand and manage emotion to successfully build and maintain relationships. Promotes and establishes trust by using tact and demonstrating genuine interest in others.
- **Influence/Persuasion-** Asserts own ideas and persuades others, gaining support and commitment from others; mobilizes people to take action, using creative approaches to motivate others to meet organization goals.
- **Innovation/Entrepreneurial Spirit-** Applies original thinking in approach to job responsibilities and to improve processes, methods, systems, or services.
- **Integrity/Credibility-** Demonstrates a high level of dependability and trustworthiness in all aspects of the job.
- **Mission-Driven-** Demonstrates responsibility for the image and effectiveness of the organization. Demonstrates strong commitment to meeting the needs of co-workers, staff, patients, donors managers, or community members, striving to ensure their full satisfaction.
- **Organizational Understanding-** Understands agendas and perspectives of others, recognizing and effectively balancing the interests and needs of one's own group with those of the broader organization.
- **Persistence-** Capacity to deal with unexpected challenges and changes in one's environment, and to successfully rise to the challenge, demonstrating discipline and resiliency.
- **Problem Solving-** Builds a logical approach to address problems or opportunities or manage the situation at hand by drawing on one's knowledge and experience base, and calling on other references and resources as necessary.

Source: Syracuse University Performance Partnership
Process: Competency Library. Found at
http://humanresources.syr.edu/staff/nbu_staff/comp_library.html; UF Health, Gainesville, FL; Philanthropy
Leadership Council interviews and analysis.

Candidate Competency Definitions (cont.)

List of Competencies (Cont.)

- **Professionalism-** Thinks carefully about the likely effects on others of one's words, actions, appearance, and mode of behavior. Selects the words or actions most likely to have the desired effect on the individual or group in question.
- **Stakeholder Focus-** Centralizes all efforts and tasks around meeting the needs of donors and prospects, alumni, faculty, volunteers, and friends of the institution.
- **Strategic Thinking/Execution-** Ability to develop donor strategies and plans that integrate into the organization's mission, priorities, and goals. Makes decisions authoritatively and wisely, after adequately contemplating various available courses of action.
- **Time Management-** Establishes a systematic course of action for self or others to ensure accomplishment of a specific objective. Sets priorities, goals, and timetables to achieve maximum productivity

Source: Syracuse University Performance Partnership Process: Competency Library. Found at http://humanresources.syr.edu/staff/nbu_staff/comp_library.html; UF Health, Gainesville, FL; Philanthropy Leadership Council interviews and analysis.