

# **YUKON UNIVERSITY** **POSITION DESCRIPTION**

## **PART I - IDENTIFYING DATA**

**Position Number:** YC1617  
**Position Title:** Manager, Alumni & Advancement

**Headquarters:** Ayamdigut Campus  
**Supervisor's Name:** Aisha Montgomery

**Division:** University Relations

**Supervisor's Title:** Associate Vice President,  
University Relations  
**Date Description Completed:** July, 2024

## **PART II - SUMMARY (broad statement of why position exists)**

The Manager plays a lead role in nurturing a culture of philanthropy, both within Yukon University and across the territory.

Under the direction of the Associate Vice President, University Relations, the Manager of Alumni and Advancement oversees the strategic and operational management of the Development Unit, with a focus on stewardship and engagement with current and prospective donors. The incumbent will also be responsible for developing and managing a comprehensive and alumni engagement program.

Specific responsibilities include managing the Development Office team and functions (including supporting the YukonU Foundation); implementing, measuring, and delivering fund raising campaigns and activities; building the donor and investment base; and developing and supporting fundraising policies and processes to enhance and support development activities across YukonU.

## **Duties and Responsibilities**

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

Providing strategic development and leadership to the University by:

- Supporting the Yukon University Foundation Board with fundraising initiatives.
- Developing a comprehensive strategic plan to engage Yukon University alumni
- Leading all fundraising activities and coordinating internal and external teams to procure gifts in support of the campaign pillars;
- Developing a University-wide culture of philanthropy by coaching and mentoring senior leadership and volunteers in fundraising activities;
- Maintaining current working knowledge of charitable tax laws
- Evaluating projects by goal, objectives, resources required, stakeholders, impact and ROI to review with AVP, University Relations
- Developing strategies, timeframes, case statements for support, supporting marketing materials, and coordinate any associated logistical details
- Managing prospect lists, developing strategies, and cultivating donors
- Developing and executing targeted cultivation plans and solicitation priorities
- Providing regular activity report to the Associate Vice President, University Relations.
- Ensuring data related to prospects and donors is recorded and tracked in DonorPerfect
- Ensuring donor acknowledgement, stewardship, and recognition as appropriate
- Planning, managing and presenting cultivation and recognition events (when appropriate)
- Developing institutional policies and procedures to implement effective fundraising activities and strategies.
- Developing an annual budget that aligns with Yukon University operating and capital budgets.
- Recommending and implementing appropriate staffing, contracting and capacity building activities that support Development office activities.

- Liaising with peer groups in post-secondary communities and professional organizations to develop and share best practices.

## **OTHER PRINCIPLE DUTIES AND RESPONSIBILITIES**

- Supervising and providing leadership to Development Office team members and managing overall operations including budgeting, research and proposal writing.
- Overseeing job performance, capacity building and evaluation of employees, including coaching and mentoring practices.
- Implementing and managing a customer relationship management system for donors and other key contacts; committing to protecting the anonymity of donors who wish to maintain complete confidentiality.
- Developing and coordinating an institution-wide accountability process to ensure donor requirements for funding are met and delivered on in a timely manner.
- Overseeing the implementation of major sponsorships and other Development Office partnerships.
- Facilitating effective team interaction and collaboration, acknowledging team contributions, building positive relationships within the team and taking an active interest in employees.
- Establishing and implementing ethical and efficient policies, systems and practices.
- Providing timely and accurate analysis and reporting on all program activities as directed by the Yukon University President and Foundation Board Chair.
- Ensuring effective financial management practices including invoicing, reporting, Accounts Payable, Accounts Receivable, Payroll, disbursements, expense claims etc.
- Managing and reporting on budget including quarterly variance reports and developing plans to mitigate overspending.
- Complying with Procurement policies and procedures.

### **Provide creative leadership and campaign coordination for the Development Office and Foundation Board by:**

- Assessing individual donors to identify interests and align them with YukonU priorities and expectations.
- Managing and executing development of campaign materials, including ideation, copy, art, design, print, presentation and web materials.
- Selecting and project managing contractors, vendors and employees engaged in campaign implementation initiatives.
- Providing overall leadership, guidance, timelines and coordination for YukonU fundraising events including prospect donor tours, fundraising events, and other relevant activities, including those of the YukonU Foundation.

#### **1. Examples of Additional Divisional Activities which may be performed:**

- Keeping abreast of trends that affect fundraising operations so that the University is well positioned to take advantage of emerging strategic opportunities.
- Other duties as directed by Associate Vice President, University Relations

**Approximate percentage of job time above functions are performed: 5%**

#### **2. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position:**

- Approximately one year/academic year

## **A. Problem-solving and decision-making**

1. a) **List any sections of Acts, Regulations, and Policies or Procedures the incumbent must be fully familiar with in order to perform the position's functions:**

- Laws surrounding the management of a Foundation Board
- Income Tax Act and Canada Revenue Agency policies and guidelines for operating a registered charity.
- Donor Bill of Rights
- Relevant sections of the University Act - administering
- All Yukon University Policies and Procedures - administering
- Yukon University safety program
- YukonU Style guide
- YukonU Brand documents
- Standards for purchasing of products and services - administering
- Freedom of Information and Protection of Privacy Act

- b) **Is the position responsible for interpreting, administering, or enforcing any of the above?**

Administers the above to ensure that the unit and its projects are conducted in accordance with legal and policy requirements governing Yukon University and the tax laws of the country.

2. a) **Describe the kinds of recommendations the incumbent is regularly required to make and to whom:**

- Collaborates with senior University faculty and administrators involved with academic programming, research, and financial services.
- Makes recommendations to the supervisor on: Institutional fundraising priorities and goals, recommendations with regards to the acceptance or rejection of significant donations, as per Gift Acceptance Policy and annual plans for identifying, cultivating, soliciting, and stewarding prospects and donors.

- b) **Who normally makes the final decisions with respect to those recommendations?**

Yukon University President

3. a) **Describe the kinds of final decisions regularly made for which the incumbent is held accountable.**

Decisions within the scope of:

- management of approved budget and revenue generation;
- Development strategies and creative direction;
- Gift solicitation;
- Foundation management;
- Plans for cultivating, soliciting and stewarding prospects and donors.

- b) **What is the direct impact of those decisions?**

Decisions have an impact on the ability of Yukon University to develop new education and training opportunities and increase accessibility through student financial support. Decisions impact the viability of community partnerships, the Universities ability to recognize and retain current opportunities and future donors, as well as potentially impacting the reputation and image of the University.

## **B. Freedom to Act**

1. **Describe the way in which this position receives direction:**

Work is prioritized according to goals, objectives and assignments as directed by the Associate Vice President, University Relations

2. **What legislation, regulations, procedures, or established practices guide, constrain, or limit the activities of this position?**

Income Tax Act and all Canada Revenue Agency policies and guidelines for operating a registered

charity.  
 Donor Bill of Rights (industry document)  
 relevant sections of the University Act - administering  
 All Yukon University's Policies and Procedures - administering  
 Yukon University safety program  
 YukonU Style guide  
 YukonU Brand documents  
 Laws surrounding the management of a Foundation Board, including Articles and Bylaws of Incorporation  
 Standards for purchasing of products and services - administering  
 Freedom of Information and Protection of Privacy Act

**3. How is the work of the position normally checked or evaluated?**

Through performance evaluations, the supervisor's review of progress relative to annual strategic targets, through periodic feedback from donors, and through progress on the performance plan. Annual targets will be set by workplan goals and objectives including donor-related metrics.

**4. What types of decisions are normally referred to the supervisor? (Give examples)**

- donor proposals final approval
- annual planning and creative direction
- rejection of gifts

**C. Financial Accountability**

**1. a) Annual Budget (for unit under the direct control of the position):**

<b>Fiscal year:</b>	<b>2024/2025</b>
<b>Annual payroll:</b>	<b>\$366,000</b>
<b>O/M Budget (excluding payroll):</b>	<b>\$57,000</b>
<b>Capital Budget (excluding payroll):</b>	<b>\$5,000</b>
<b>Revenues:</b>	<b>\$50,000</b>
<b>Recoveries:</b>	<b>\$0</b>

**b) Who prepares this budget?**

Manager, Alumni and Advancement in consultation with the Associate Vice President, University Relations.

**c) What is this position's accountability for budget once allocated?**

Ensuring budgeted expenses are in line with the development plan for expenditures and revenues related to activities included in the approved budgets and adherence to University financial policies and procedures.

**d) Does position have authority/ability to reallocate resources? (describe)**

Yes, within budget allotment.

**e) Signing authority levels:**

Delegated spending authority as a cost centre (120550) to acquisition up to \$10,000

**D. Management Supervision of Human Resources**

1. No direct supervisory duties.  
 2. Supervisory duties.

a) Number of positions supervised directly: Permanent 1  
 Aux/Casual \_\_\_\_\_

b) Nature of supervision: (check any of the following supervisory tasks that are to be performed on a regular basis):

- a)  Show colleagues how to do tasks
- b)  Train other employees in work procedures
- c)  Assign work and review for quality/quantity
- d)  Establish work priorities and schedules
- e)  Change duties and responsibilities
- f)  Participate with supervisor in employees' performance evaluations, or formally appraise employees' work performance and discuss appraisal with them, making a final recommendation to advance or withhold merit increments
- g)  Recommend appointment or rejection upon completion of probationary period
- h)  Interview employees with attendance or performance problems
- i)  Act as first formal step in the grievance procedure
- j)  Interview candidates for vacant positions in the unit
- k)  Give opinion to supervisor on selection of new employees, or make final decision on selection of new employees
- l)  Other (describe)

**E. Key Personal Contacts**

<u>Who (what positions or groups)</u>	<u>Purpose</u>	<u>Frequency</u>
Supervisor	Direction & consultation	Daily
Board Chair	Consultation & communication	Weekly
Senior Executive Committee (SEC)	Communication	Monthly
Budget Officer(s)	Support with Finances	As needed
Internal participants, external parties and donors and potential donors	To exchange information, manage relationships, and raise funds	Daily

**F. Tools, Equipment, or Machinery Used**

<u>Name</u>	<u>Purpose</u>	<u>Percentage of Time</u>
General office and computer equipment	Word processing, database maintenance, spreadsheets, printing, faxing, telephone	60%
Event equipment	Manage events and make presentations	5%

**G. Working Conditions**

Describe any adverse conditions that are normal and expected in the job.

a) Describe weights lifted:

<u>Type</u>	<u>How Heavy</u>	<u>Percentage of time</u>
Normal office environment		

b) What working conditions (sitting, standing, bending, reaching) or types of physical effort (hiking, walking, driving) are required?

<u>Type</u>	<u>Percentage of time</u>
Sitting	75%

Standing	10%
Driving	5%
Walking	10%

c) Describe any **physical hazards** present:

<u>Type</u>	<u>Percentage of time</u>
Travelling to other locations	5%

d) Describe special **physical conditions leading to discomfort**:

<u>Type</u>	<u>Percentage of time</u>
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e) **Interpersonal Conditions**: Check any of the following conditions, which are normal and expected in the job and **give examples**:

- High level of dissatisfied clients.
- High level of emotional clients e.g. students having financial/personal problems.
- Potential physical abuse from clients.
- Regular critical deadlines e.g. short notice on workshop/travel schedules requiring booking of vehicles, obtaining supplies, payroll, hiring of contract employees, high level of irregular critical deadlines.
- Constant interruptions e.g. telephone and walk in clients.
- Instructions from more than one source e.g. instructions from Director and division staff.
- Students or staff under work related stress e.g. students in financial/personal problems.

f) **Travel Required**

- a) average number of trips annually 6-8 trips
- b) average number of days per trip 3 day
- c) average distance per trip 2000km
- d) most frequent mode of transportation Airplane, taxis

H. **Organization Chart**

- Complete portion **above** dashed line whether the position supervises or not.
- Complete portion **below** dashed line if this position supervises others.

**IMMEDIATE SUPERVISOR'S POSITION**

Title: Associate Vice President, University Relations

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**PEER POSITIONS: (all those reporting to the same immediate supervisor)**

Title: Director, Marketing and Comms

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**SUBJECT POSITION TITLE:** Manager, Alumni and Advancement

**SUBORDINATE POSITIONS:**

Title: Stewardship Officer

**PART III – SIGNATURES**

I confirm that this describes the duties and responsibilities I require of an incumbent in this position and have reviewed the description with the incumbent (where applicable).

I have read the foregoing position description and understand that it is a general description of the duties and responsibilities assigned to the position I occupy.

.....  
Dean/Director or Designate

.....  
Incumbent

Date: .....

Date: .....

**PART IV - QUALIFICATIONS**

**To be completed by the Dean/Director or designate**

**A. Minimum Knowledge, Skills, and Abilities Required**

- Bachelor’s Degree or equivalent in combination with a minimum of five years’ experience in fundraising at a complex organization;
- Financial management skills, including budget development and management, procurement practices and contract oversight.
- Experience working with a Board of Governors;
- Experience in planning and implementing development programs, including developing processes and policies to support and implement the program
- Experience developing a multi-year strategy, including developing results- based plans, timelines and indicators to execute and implement the strategy
- Exceptional interpersonal, communication and relationship management skills with proven proposal and presentation skills;
- Demonstrated core competencies in influencing others, effective communication, strategic thinking, and leadership.
- Pro-active self-starter with the ability to work as part of a team and independently;
- Ability to anticipate requirements and assess outcomes;
- Demonstrated organizational ability, creativity and analytical skills;
- Advanced skills with MS Word, Excel, and Outlook;
- Evidence of leadership and initiative, tact, diplomacy, attention to detail;
- Effective and efficient under pressure of high volume and changing priorities;
- Experience with constituent relationship management system, Raiser’s Edge preferred;
- Willingness and ability to adjust to changing conditions or priorities;
- Must adhere to the highest ethical standards, demonstrate an empathetic disposition and perseverance, and convey sensitivity to the needs of donors.

**B. Licenses, Certificates Required - Give title and section of any legislation, regulations, or other authority where applicable.**

- Valid class 5 Driver’s License.

**C. Other skills and/or knowledge which may be desirable, but not necessarily essential to the performance of the position’s duties.**

- Experience in the post-secondary environment.
- High-level customer service skills.
- High degree of resilience.

**PART V – UNIVERSITY SIGNOFF**

Comments:

I approve this position description as being representative of the work I require to be performed and that the responsibility levels identified have been delegated to this position.

.....  
Director, Human Resources Services

.....  
University President

Date: .....

Date: .....

**FOR HUMAN RESOURCE SERVICES USE ONLY:**

Evaluation Point Results: 370 Knowledge and Skills: 184 Accountability: 80 Mental Demands: 106 Working Conditions: 0  Total Points: 370 Pay Level: ME06
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