

JOB DESCRIPTION

JOB TITLE: Major Gifts Officer

ORIG.: 03/08 REVISED: 01/19

JOB CLASS NO.: 040

FLSA Status: Exempt

GENERAL SUMMARY OF DUTIES: Secures major gifts working with individuals, foundations and businesses to acquire, manage, cultivate and solicit gifts in the range of \$10,000 and higher for the benefit of the Ridley-Tree Cancer Center (RTCC) and the Cancer Foundation of Santa Barbara (CFSB). Works as part of the Philanthropy team to leverage the potential for increasing gift support.

SUPERVISION RECEIVED: Reports directly to the Executive Director **SUPERVISION EXERCISED:** None

TYPICAL PHYSICAL DEMANDS: Requires sitting for long periods of time. Some standing, stooping, bending or reaching required. May require lifting up to 30 pounds. Requires manual dexterity sufficient to operate a computer, calculator and telephone. Requires normal range of hearing and vision.

TYPICAL WORKING CONDITIONS: Office environment. Occasional evening or weekend work and some irregular hours. Involves frequent contact with staff and the public. Work may be stressful at times.

EXAMPLES OF DUTIES: (This list may not include all of the duties assigned.)

1. Achieves annual fundraising and activity goals by soliciting gifts of \$10,000 and higher from donors and prospects.
2. Manages portfolio of approximately 150 prospect donors. Creates and maintains a moves management plan for each donor that will serve as a foundational communication, cultivation, solicitation, and stewardship plan for that individual. Executes the plan on a timely basis so individuals are retained and upgraded.
3. Makes 10-20 personal acquisition/cultivation/ solicitation contacts and visits per week to prospective donors.
4. As appropriate, identifies individuals as major gift or capital prospects; solicit gifts; determines follow-up strategy. Identifies and researches the potential of new prospects and donors targeted for upgrade and/or renewal.
5. Prepares written proposals, informational materials, endowment agreements, gift illustrations and other materials needed to secure major gifts.
6. Works with staff to secure appropriate project information, including budgets, and creates offers, proposals and asks that will be used with persons on the portfolio to secure gifts.
7. Maintains working knowledge of planned giving vehicles, identifies and contacts planned giving prospects, and acts as source of information for interested donors.
8. Offers educational opportunities and materials regarding planned giving to prospects and donors.
9. Monitors all prospect contacts to ensure positive and purposeful prospect and donor relations.
10. Recommends and assists with involving the Executive Director, board members, program staff or other key influencers in cultivating, soliciting and stewarding donors.
11. Works closely with the Executive Director to develop new ideas and innovative approaches to major gift fundraising.
12. Works with staff and physicians to attain strong understanding of the RTCC and its services. Uses this information to identify programs and projects that would attract gift support from individuals, corporations and foundations.
13. Completes monthly reports as required by management that accurately reflect caseload activity and performance.
14. Completes responsibilities in a timely manner consistent with organizational policy, goals and values.
15. Attends required meetings and events, and participates in committees as requested.
16. Participates in quality improvement and safety programs/activities.
17. Participates in professional development activities and maintains professional affiliations.
18. Handles confidential matters and adheres to HIPAA regulations.
19. Performs related work as required.

PERFORMANCE REQUIREMENTS:

Knowledge, Skills, & Abilities:

Knowledge of philanthropic principles, theories, practices and research to achieve fundraising goals consistent with the missions of the RTCC and CFSB. Skilled in establishing and strengthening partnerships and relationships with grateful patients, families and others in the community. Ability to communicate effectively the mission, services, goals and values of RTCC and CFSB to a variety of audiences. Ability to qualify prospects that represent the highest giving potential for the organization. Ability to create reasonable financial goals for each donor based on the donor's giving and the potential. Ability to create a personal contact and solicitation plan that takes into account the individual donor's interest, motivations, giving patterns and philanthropic preferences. Ability to secure project and organization information and create and write effective offers, proposals. Ability to secure information that can be sent back to donors to report on how their support was used. Ability to work effectively with a team of people, manage processes, deadlines and budgets while adhering to the policies and procedures of the organization. Ability to get along with peers, subordinates and management and maintain a positive and constructive attitude while solving problems. Computer (PC) proficiency required including Word, Excel, PowerPoint. Bachelor's degree in business or related field. At least three years of fundraising or related experience with a proven track record of soliciting and closing major gifts in the five to seven figure range. Raiser's Edge proficiency preferred. CFRE preferred.