The University of North Carolina General Administration **EPA Designation Request Form**

Institution: UNC Asheville	
Division/School/Department: University	ity Advancement/Annual Giving
EPA Designation Requested: Senior Academic and Academic	Iministrative Officer, I.A.* (SAAO, Tier I) Iministrative Officer, I.B.* (SAAO, Tier II) and Public Service (IRPS)
Proposed Position Information: Proposed Title: Leadership Gifts Officer	
Proposed Working Title (if different)	Same as above
Proposed Position Number: 0002066	Proposed JCAT Code: 437000
Current Status:SPAX_EPA	New Position
Current Position Information (if ap Current Title: Senior Major Gifts Officer	
Name of employee in position: Sallie	Broach
Name and title of supervisor: Laura H	erndon, Assistant Vice Chancellor for Annual Giving
nstitutional Authorization: Print Name: ^{Jaime Head}	Title: Classification and Compensation Specialist
Print Name: ^{Jaime} Head	Title: Classification and Compensation Specialist Date: 07/09/2013
Print Name: Jaime Head Signature: <u>Jame Head</u>	Date: 07/09/2013
Print Name: Jaime Head Signature: <u>Jame Head</u>	Date: 07/09/2013 PO #1450, One University Heights, Asheville, NC 28804

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- ☑ A written justification for requested action to include specific reference to relevant elements in SAAO definition or Instructional/Research definitions.
- ☑ A detailed position description.
- ☑ An organizational chart that includes position titles, position numbers, position designations (SPA, EPA, SAAO), and employee names.

Submit to: hrab@northcarolina.edu

Questions to: Keith Dupuis, HR Consultant, (919) 843-5479, kedupuis@northcarolina.edu



Human Resources Department

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July 9, 2013

William Fleming
Vice President for Human Resources
The University of North Carolina
910 Raleigh Road
P.O. Box 2688
Chapel Hill, NC 27515-2688

Dear Mr. Fleming:

I respectfully request a title change for position #002066 from "Senior Major Gifts Officer" to a new title of "Leadership Gifts Officer."

This title change will reflect a broader scope of responsibility for this position in regards to meeting fundraising goals. This change reflects the ongoing need to identify, cultivate and solicit funds using a variety of different methods to meet the needs of the University. This position will still have direct responsibility for the solicitation of funds. With your approval, this position will continue to be considered an EPA Senior Academic Administrative Officer (SAAO Tier II) position within our University Advancement division.

This position reports to the Assistant Vice Chancellor for Annual Giving.

I have included an updated job description and organizational chart for your review. Thank you for your attention to this request. Please let me know if I can provide additional information or assistance. I appreciate your consideration.

Sincerely,

Jaime Head

Classification and Compensations Specialist

UNC Asheville

Jaime Head



Job Description

Classification title:

Leadership Gifts Officer

Working Title:

Leadership Gifts Officer

Position number:

002066

Name of immediate Supervisor:

Laura Herndon

Supervisor's Position Title and

Number:

Assistant Vice Chancellor for Annual Giving, Position #000118

Division:

University Advancement

Department:

Annual Giving

SPA/EPA:

EPA

Terms of Employment:

Full-Time

Number of Months:

12 Months

OA Category

Professional (30)

Proposed salary:

Current Salary \$70,000

The Leadership Gifts Officer is a key member of the University's Annual

Giving team.

The Leadership Gifts Officer will have accountability as "lead agent" for one or more special projects in the University's areas of priority, as well as general responsibility to facilitate the annual gifts efforts of the UNC

Asheville Foundation.

Job Objective:

The Leadership Gifts Officer will serve as a team member in identifying possible and probable donors, working with those people to find the intersection between donors' interests and University priorities, making sensitive asks and showing gratitude creatively. This position will work to develop annual gifts leading to major gifts for the University within the University fundraising initiatives.

Other offices of the University with which the Senior Major Gifts Officer will coordinate activity include: Deans and Department Chairs, Alumni Relations, Annual Giving, Marketing & Communications, Advancement

Services, and Prospect Management & Research.

Supervisory Responsibility:

None

FLSA:

Exempt

Minimum qualifications (education/experience/skills):

- 1. Bachelor's Degree
- 2. Three (3) years of related work experience in fundraising in academic setting.
- 3. Effective interpersonal communication skills.
- 4. Ability to work collaboratively and independently as appropriate.

A master's degree and/or 2-5 years of work experience in fundraising in an academic or non-profit setting is highly desired. A demonstrated track record of cultivating and soliciting annual to major gifts of \$10,000 and higher is preferred. Previous supervisory experience is a plus.

Preferred education/experience/skills:

Understanding of gift planning techniques and IRS rules for gifts in all categories is ideal.

Knowledge of the development field and fundraising techniques.

Abilities as follows:

- 1. Outgoing personal presentation, excellent listening skills, confidence, ability to relate to people of all ages, ability to nurture and steward professional relationships with donors from prospect to a lifelong range of philanthropic giving.
- 2. The ability to analyze donor potential and donor desires.
- 3. The ability to communicate effectively through oral and written messages.
- 4. Ability to work, independently and collectively, to advance the work of a team and to accomplish agreed upon goals.
- 5. Good balance between people orientation and goal orientation.
- 6. Ability to approach challenges creatively.

Normal office hours are Monday-Friday from 8:00 a.m. to 5:00 p.m., but extended afternoon, evening and weekend work is required to be successful in this position. Office hours may be adjusted to meet the travel and working schedule of this position. Required travel will include regular local travel, one or two overnight regional trips per month and more extensive travel on a quarterly basis. Much work is accomplished outside of regular office hours.

This position serves as the Leadership Gifts Officer and is responsible for leading solicitation efforts, coordinating projects and developing cultivation plans in the area of annual gifts leading to major gifts.

Responsible for asking for gifts of \$1,000 and higher from alumni and friends of the University.

Essential Job Functions:

Manage relationships with approximately 75 prospective donors; identify, qualify, cultivate, ask and steward these important alumni and friends of the University.

Participate in all aspects of the gift cycle:

Knowledge, skills and abilities required (Functional Competencies):

Work schedule and hours:

- Initiate contacts with potential leadership gift donors
- Develop appropriate cultivation strategies for them, including working with volunteers
- Move potential donors in an appropriate and timely fashion toward solicitation and closure
- Make asks when appropriate
- Recommend and participate in appropriate stewardship activities and events for donors

Works collaboratively with and in support of volunteers, other University Advancement staff, and other University representatives to cultivate and ask donors for support of University-wide priorities.

Monitors all prospect contacts to ensure positive and purposeful prospect and donor relations.

Maintains computer records of their individual prospect and donor contacts.

Recommends and assists with programming involving friends, alumni and University leadership.

Works collaboratively and strategically with the Chancellor, Vice Chancellor for Advancement, other fundraising professionals, faculty, staff and other campus leaders.

The Leadership Gifts Officer is expected to travel frequently to effectively carry out the requirements of a successful fundraising process. Regular local travel, one to two regional overnight trips per month, longer trips quarterly.

The Leadership Gifts Officer works with the Annual Giving Team to set goals and other yearly objectives, and has the responsibility for expanding the scope of major gift programs as appropriate,

The successful Leadership Gifts Officer will be an active member of the greater Asheville community through involvement with civic and community organizations and initiatives.

The successful Leadership Gifts Officer will also be adept at articulating a deep appreciation for the value of a public university with a strong emphasis on the liberal arts and will demonstrate enthusiasm for working in an active and evolving environment committed to creativity and the patient building of relationships with community constituencies.

University Advancement

