Strategic Philanthropy Manager

(Principal Gifts)

Department: External Relations

Hours of work: Full-Time | 37 hours a week

Contract type: Open

Salary: Grade 7 | £42,155 - £51,805 a year
**Main purpose of the role**

The University of York was founded on principles of equality, diversity and inclusion. Our new strategic vision sets out our role as a University for public good, building upon our founders who endowed the University with a strong social purpose.

To help us achieve our aims, the University of York’s Office of Philanthropic Partnerships and Alumni (OPPA) works with a community of global donors including individual philanthropists, family trusts, foundations, companies and our alumni community. Our approach is change-driven and collaborative. We invite supporters to be part of the University of York community and to find new ways to tackle inequalities, new ways for research to help society, and new ways to help every student succeed.

With ambitious plans to grow our income, building on the success of the University’s first transformational fundraising campaign York Unlimited, there is no better time to join the team.

We are seeking a highly motivated individual with strategic insight, excellent communication skills, the ability to build strong relationships, vision and commitment, to join as a **Strategic Philanthropy Manager (Principal Gifts)** in the Individual Philanthropy Team.

As a senior member of the team, you will lead the University’s principal gift programme, working with individual major donors. Working with colleagues across the institution, you will be responsible for working strategically with University leadership to create inspirational stories, bringing supporters closer to the organisation and helping them to create impact through their philanthropic goals. Working with a small number of donors and prospects, you will promote bespoke transformational giving opportunities to York graduates and non-alumni high net worth philanthropists. This is an exciting time to join the University of York as York Unlimited - the campaign for the University of York demonstrates clearly the role philanthropy has to play in the University’s strategic vision.

In this varied role you will work closely with all members of OPPA and with a broad range of colleagues, including academics, University board members, University council members and staff within departments. Working within a small team you will have a high level of independence and authority and through working to personal targets be expected to make a significant contribution to the team’s annual and future income and pledge targets.

This role will suit an individual with significant senior fundraising experience who is looking to develop their career in philanthropy to the next level.

**The Office of Philanthropic Partnerships and Alumni (OPPA)**

Office of Philanthropic Partnerships and Alumni (OPPA) works with a community of global alumni and donors to deepen their ties with York and each other, and encourage them to support the University through York Unlimited, the Campaign for York. The teams are:

**Individual Philanthropy**: manages major individual philanthropy and the legacy giving programme.

**Corporate and Foundation Philanthropy**: develops long term, strategic partnerships with philanthropic corporate and foundation supporters.

**Fundraising and Community Engagement**: managing mass fundraising appeals, crowdfunding campaigns, community fundraising and student projects and develops volunteering and alumni engagement programmes in support of the University’s strategic aims.

**Operations and Experience**: providing business intelligence, information and insight, governance and...
stewardship of supporter and alumni relationships, and managing all mass communications with alumni and supporters.

University of York for Life: developing a new lifetime programme of support for our global alumni community.

OPPA is part of the University’s Directorate of External Relations, and works closely with other sections of the directorate, which are Marketing, Recruitment, Outreach and Admissions, Communications, Public Engagement and Events, and International Student Recruitment, Partnerships and Mobility.

Main purpose of the role

The role of Strategic Philanthropy Manager (Principal Gifts) is to inspire and encourage transformational philanthropic giving from major individual donors to the University of York.

Working in the UK and across international markets to cultivate and solicit gifts from global philanthropists, you will manage a small portfolio of prospects and secure gifts primarily from individuals. You will work to build engagement and involvement of potential major donors with senior leaders across the University to develop and deliver a pipeline of principal gifts in alignment with the University of York’s strategic priorities.

With significant judgement, creativity and persuasiveness, you will network and influence at the highest levels to identify new prospective donors, and engage senior leadership and volunteers in the identification, cultivation, solicitation and stewardship of new principal gifts.

You will lead by example, providing fundraising and relationship advice, support and resources to the Vice Chancellor and leadership team.

You will work with academics and senior leadership to co-create and develop key University initiatives for philanthropic support, in areas of interest to high net worth philanthropists.

With the support of the OPPA’s Prospect Research and Supporter Relations Teams, the Strategic Philanthropy Manager (Principal Gifts) will ensure that their portfolio of prospective donors are taken through the stages of donor development – from initial research, through discovery, engagement and cultivation activity, to asking for gifts, due diligence, stewardship and donor progression, creating a sustainable pipeline of transformational philanthropic income.

This is a demanding and rewarding role that requires strategic thinking, resilience and a long term view. The post holder will work to individual financial targets and KPIs based on pipeline development.
Key responsibilities

1. Role Specific Responsibilities

Relationship Management

- Manage a personal international portfolio of high net worth donors and prospects, strategically building those relationships, with appropriate and timely solicitation, securing gifts and multiyear pledges.
- Network and influence at the highest levels in order to identify new prospective donors, utilising stakeholder mapping amongst the University’s global community of senior alumni, volunteers, staff, retired staff and partners.
- Establish tailored cultivation plans for prospective principal gift prospects, designing and implementing strategies to introduce and engage them with the University.
- Create inspiring funding propositions for funding in partnership with the appropriate academic and University leadership, within the philanthropic priorities of the University of York.
- Establish a tailored stewardship strategy for each principal donor and ensure that these are delivered, in conjunction with colleagues in OPPA, senior members of University staff and external volunteers as appropriate.

Growing philanthropic income across the University

- Make best possible use of senior volunteers, leadership and academic leaders’ time, ensuring that commitment to donor cultivation opportunities is commensurate with opportunities at hand and providing guidance and support.
- Contribute to the planning and leadership of York’s philanthropic priorities, inputting into the continuous process of shaping and developing campaign projects in areas of interest to principal gift philanthropists, contribute to overall campaign strategy development
- Ensure there are opportunities to cultivate and steward key relationships at major University events.

Monitor data and performance

- Accurately record information and communications, enquiries, research, gifts and pledges in a timely fashion on RE/NXT database, managing data in relation to the prospect pool and donor pipeline performance.
- Work to targets designed to fulfil future significant philanthropic ambition; including KPIs based on cash and pledge value, moves and asks made, creating a robust principal gift pipeline of pledged and cash income generated.
- Liaise with members of the Operations and Experience team within OPPA to ensure a consistent and accurate approach to data management, ensuring compliance with the Data Protection Act, Fundraising Regulator and Information Commissioner’s Office
2. University of York Responsibilities for Grade 7
(Role holders will be required to undertake some or all of the duties below)

Service and Operational Delivery
- Contribute to operational leadership and decision making to shape the nature and level of professional and support services within your own area of responsibility.
- Line manage and lead the work of a team or section; optimise use of resources and ensure team objectives are met; set the overall direction and goals of the team.
- Accountable for delivery of a service for a large or complex area or across multiple service areas.
- Make effective use of digital solutions to carry out operational activity and lead the development of efficiency improvements.
- Provide support and encouragement for members of the team through effective leadership; demonstrate compassion and give advice on commonly occurring wellbeing issues.

Continuous Improvement
- Review service / operational delivery, identify additional service requirements or shortfalls and develop innovative solutions to progress.
- Promote the improvement and efficiency of services by implementing and managing the review and improvement of service procedures.
- Review internal and external practice to identify and deliver opportunities for future improvements or efficiencies.
- Apply expertise to identify, understand and propose resolutions for significant, long term or complex problems.
- Proactively identify opportunities for building new personal knowledge and skills for self and others.
  For roles at this level with line management responsibilities, ensure training and development needs of the team are met.
- Deliver knowledge sharing on specialist defined processes to the broader team and/or the University.

Specialist Contribution
- Act as a specialist point of contact for dealing with complex data and information sources, providing interpretation and analysis.
- Responsible for shaping the development and learning of others both within and outside of the team, through the design and delivery of training sessions.
- Provide expert professional subject expertise and problem-solving skills, sharing knowledge with the team as needed.

Collaboration and Communication
- Produce communications for promotional and reporting purposes, designing and structuring information and facts, applying creative and innovative principles to influence and engage.
- Actively participate in internal and external communities of practice and knowledge sharing with a view to inform and improve future service or operational delivery plans and development.

Governance and Oversight
- Oversee activity to ensure all processes and transactions are delivered in line with regulatory and professional service and policy standards, ensuring appropriate controls and monitoring interventions are in place.
- Provide advice to stakeholders regarding compliance and regulations where there is a level of
ambiguity or discretion to be applied.

- Horizon scan to understand emerging legislation and regulation and support consideration of the University’s response.
- Where applicable to the role, take responsibility for health and safety considerations of the work environment, through the completion and implementation of risk assessments.

Planning and Organisation

- Responsible for the planning and organisation of the workload of the team across a range of activities, on a regular basis.
- Contribute to longer term planning requirements at operational and occasionally strategic level; make recommendations about future resource requirements.
- Lead large scale projects to facilitate major service or operational change.
## Person specification

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<tr>
<th>Role Specific</th>
<th>Essential / Desirable</th>
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<tr>
<td>Experience of high net worth donor cultivation, asking and stewardship a demonstrable track record of securing multiple gifts at the six-figure level or more.</td>
<td>Essential</td>
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<td>Proven experience and proficiency at developing and maintaining relationships at a strategic level, both externally and with internal stakeholders. An ease at developing personable relationships with a wide range of people of all levels of authority, acting with diplomacy, cultural awareness and persuasiveness.</td>
<td>Essential</td>
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<td>Excellent oral and written persuasive communication skills. The ability to understand and effectively communicate complex projects to non-specialist audiences, conveying the need for support.</td>
<td>Essential</td>
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<td>Negotiation skills, to develop mutually beneficial outcomes.</td>
<td>Essential</td>
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<td>Organised and flexible, able to prioritise effectively, managing multiple projects.</td>
<td>Essential</td>
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<td>Entrepreneurial and resilient, self motivated to achieve results, meet KPIs and deadlines.</td>
<td>Essential</td>
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<td>Knowledge of data protection laws as they related to donor information</td>
<td>Essential</td>
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<td>Knowledge of Raiser’s Edge / NXT database or similar relationship management database, and ability to use it to analyse performance.</td>
<td>Desirable</td>
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<td>Knowledge of, or interest in, the UK Higher Education Sector</td>
<td>Essential</td>
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<td>Flexibility with respect to variable working hours, including availability to travel throughout UK and perhaps internationally by private and public transport</td>
<td>Essential</td>
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### University of York Person Specification for Grade 7

Level 6 qualification. (Qualifications at this level include a degree. Please view the full list). We also welcome applicants with equivalent non-UK qualifications or equivalent professional experience.

### Skills - demonstrates the ability to:

- Lead large-scale projects  
- Gather, analyse, interpret and report complex data/information  
- Use digital technologies including Google applications and/or Microsoft Office  
- Communicate to engage and influence others
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<th>Behaviours:</th>
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<td>Works collaboratively with others</td>
<td>Essential</td>
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<td>Delivers a quality service</td>
<td>Essential</td>
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<td>Develops self and others</td>
<td>Essential</td>
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<td>Actively champions respect, inclusivity, equality and diversity</td>
<td>Essential</td>
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<td>Identifies and implements continuous improvement</td>
<td>Essential</td>
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