

# Fleming College

## CAAT Job Evaluation System for Non-Bargaining Unit Employees

### Ontario Colleges of Applied Arts and Technology

The Job Fact Sheet Questionnaire (JFS) is used to gather information for job evaluation purposes for the Colleges= Administrative Staff, Part-Time Support Staff, Part-Time and Sessional Academic Staff positions. Please read each section carefully before completing.

The Education and Experience sections are to be completed by the College according to the College=s recruitment standards.

Upon completion by an incumbent, the JFS is reviewed and, when necessary, adjusted by the position=s Manager and the Senior Manager responsible for the position. Any changes to the JFS are to be reviewed with the incumbent prior to evaluation. The JFS is then submitted to the appropriate College official for job evaluation purposes.

The JFS is not finalized until it has gone through the job evaluation process and the results have been confirmed by the College. A copy of the finalized JFS will be provided the incumbent for information purposes and as a job description.

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#### 1. POSITION IDENTIFICATION

Position Title: Manager, Development  
Position Number:  
Pay Band: 10  
Incumbent: VACANT  
Location/Campus: Sutherland  
Division/Department: Advancement & Alumni  
Immediate Supervisor (title): Director, Advancement & Alumni  
Date of JFS:  
Last Evaluated:

#### Type of Position:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Administrative | <input type="checkbox"/> Part-Time Administrative |
| <input type="checkbox"/> Sessional Academic        | <input type="checkbox"/> Part-Time Academic       |
| <input type="checkbox"/> Part-Time Support         | <input type="checkbox"/> Other                    |

**I have read and understood the contents of the Job Fact Sheet (if completed by an incumbent):**

Incumbent: \_\_\_\_\_ Date: \_\_\_\_\_

#### Recommended by:

Position's Manager: \_\_\_\_\_ Date: \_\_\_\_\_

#### Approved by:

Senior Manager: \_\_\_\_\_ Date: \_\_\_\_\_

## Job Fact Sheet Questionnaire

### POSITION SUMMARY

Provide a concise description of the position by identifying its most significant responsibilities and/or accountabilities.

The Manager – Development, is responsible for the full scope of activities related to the identification, cultivation, solicitation, and recognition of a portfolio of major gift prospects and donors (\$20,000 +) for a number of Schools at Fleming College.

The incumbent works closely with the Dean(s)/academic leader(s) and their office to identify and qualify prospects and to strategically cultivate and solicit prospects and donors. The incumbent develops strategies to promote loyal giving and to upgrade donor giving, personally solicits major gifts, facilitates principal gift activity (both independently and in conjunction with senior administrators and senior fundraising volunteers), and stewards donors.

The incumbent actively participates in strategy development, planned giving, donor relations and stewardship, alumni relations, and sound information management through Raisers Edge to advance Fleming College's cause.

The Manager- Development also has oversight for the Annual Giving portfolio and is responsible for the supervision of the Annual Giving/Communications Officer in this aspect of their portfolio. They provide leadership to develop a comprehensive, strategic and multi-target annual fundraising program. As both a technical and subject matter expert, the incumbent maintains current knowledge in areas related to annual giving.

### KEY DUTIES

**% Of Time**

**1. Major Gift Fundraising**

**65%**

- Manage a diverse portfolio of 75 – 100 major gift prospects at various relationship stages (eg. cultivation, solicitation and stewardship). Prospects may include individuals, corporations, foundations, and other organizations. Prospects personally managed by the incumbent will generally be rated from \$20,000 to \$250,000.
- Responsible for securing \$500,000 to \$750,000 in new contributions annually through cash or gift in kind donations.
- In collaboration with the Director Advancement & Alumni Relations, liaise with the Dean(s)/academic lead(s) to build a case for support and related fundraising priorities and encourage them to support fundraising efforts by being active participants in cultivation and stewardship of donors.
- Prepare customized major gift proposals, negotiate and bring solicitations to closure both independently and in conjunction with senior administrators and senior fundraising volunteers. This includes the preparation of gift agreements, in conjunction with the unit head(s), finance, and legal counsel, if necessary.
- Ensure recognition and thorough stewardship of donors including follow-through on the gift implementation, administration of the funds and related expenditures.
- Prepare a work plan with goals and objectives, as well as a timeline and strategies keeping a focus on advancing relationships with top prospects while continuing to integrate new prospects into the portfolio. Prepare written and oral reports outlining progress for the Director Advancement & Alumni Relations as required.
- Incorporate other areas of Advancement into cultivation and solicitation strategies as appropriate including: a) gift planning, b) annual giving (eg. conducting/incorporating annual asks into work), c) Alumni Relations (eg. leveraging alumni events to connect with existing and potential prospects), d) Advancement Services (eg. ensuring pledge information is relayed quickly and correctly).
- Support donor cultivation and recognition events as they exist from time to time.

**2. Annual Giving Program**

**20%**

- Provide leadership and direction to the Annual Giving/Communications

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- Officer. Establishes annual performance goals and reviews performance regularly to provide required coaching.
- Responsible for meeting a growing annual fundraising target and developing a multi-year strategic plan to support this effort.
- In partnership with the Annual Giving/Communications Officer, develop strategic execution, management and monitoring of the college's Annual Giving Program (Telemarketing, Direct Response, Employee Campaign, Bursaries and Awards Program, Leadership Giving) and develops opportunities to streamline and advance these initiatives.
- Provide leadership to the Annual Giving/Communications Officer to develop appropriate marketing and engagement tools.

**3. Operations & Database Management**

**15%**

- Maintain a strong familiarity with Canada Revenue Agency guidelines pertaining to charitable giving and commits to industry practice standards such as the Donor Bill of Rights and The Association of Fundraising Professional's and Imagine Canada's Fundraising Code of Ethics.
- Support the Director of Advancement & Alumni Relations in the operational management of the Advancement & Alumni Relations Office.
- Responsible to recruit, develop and supervise the students working within the Advancement & Alumni Relations Office.
- With the Director, Advancement & Alumni Relations, establish the annual Operating Plan for the department identifying specific priorities and tasks for the Annual Giving/Communications Officer for the upcoming year.
- Support all gift-in-kind processing for receipting and stewardship purposes
- Track all activity with prospects and donors in Raisers Edge and plays an active role in increasing and maintaining data integrity (including prospect and proposal coding updates, address updates, employment information etc)
- Contribute to the preparation of a budget and monitor expenses so as not to exceed that budget.
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**TOTAL:**

**100%**

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### 1. COMPLEXITY – JUDGEMENT (DECISION MAKING)

**Complexity** refers to the **variety** and **relative difficulty** of **comprehending** and **critically analyzing** the material, information, situations and/or processes upon which decisions are based.

**Judgement** refers to the **process** of identifying and reviewing the available options involved in decision making and then choosing the most appropriate option. Judgement involves the application of the knowledge and experience expected of an individual performing the position.

Provide up to **three examples** of the most important and difficult decisions that an incumbent is typically required to make.

1. Develop and implement detailed strategic plans and timelines for annual and capital fundraising campaigns that assess and balance the diverse needs of college stakeholders and that set aggressive, yet achievable, targets. This involves identifying potential donors and market conditions, setting priorities, assigning internal and volunteer resources to projects that will determine the success or failure of fundraising initiatives that affect College projects, student support, financing and reputation.
2. Determine how best to advance major gift prospect relationships including which senior college officials and volunteers to involve and when to attempt to take the next step in a given relationship in an effort to secure the most impactful donation possible for the College and the donor. Poor decisions in managing relationships can result in reputational risk and failure of fundraising programs. Determine how to deal with complaints and how to resolve disputes and recognize when a major issue should be brought to the attention of senior management.
3. Determine how to best utilize data from Raisers Edge, analyze results, identify gaps and strengths and apply reasoning to modify strategy as appropriate

### 2. EDUCATION (to be completed by the College)

Education refers to the minimum level of formal education and/or the type of training or its equivalent that is required of an incumbent at the point of hire for the position. This may or may not match an incumbent's actual education or training.

#### Non-Post Secondary

- Partial Secondary School       Secondary School Completion

#### Post Secondary

- 1-Year Certificate       4-Year Degree
- 2-Year Diploma       Masters Degree
- X    3-Year Diploma/Degree       Post Graduate Degree
- Professional Designation      Specify: \_\_\_\_\_
- Other      Specify: \_\_\_\_\_

The College is to identify the minimum level of education and/or type of training or its equivalent that is required for the position based upon the College's recruitment standards.

- University degree or equivalent combination of education and fundraising experience, specifically in an educational setting.

Specify and describe any program specialty, certification or professional designation necessary to fulfil the requirements of the position.

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- Certified Fund Raising Executive (CFRE) designation required (or demonstration that candidate qualified to complete the CFRE certification process which must be complete within 3 years of their start date).

Specify and describe any special skills or type of training necessary to fulfil the requirements of the position (e.g. computer software, client service skills, conflict resolution, operating equipment)

- Knowledge of Raiser’s Edge software and the ability to work with the software to develop reports to support donor cultivation, solicitation, stewardship and recognition efforts.

### 3. EXPERIENCE

Experience refers to the amount of **related, progressive** work experience required to obtain the essential techniques, skills and abilities necessary to fulfil the requirements of the job at the point of hire into the position. This may or may not match the incumbent’s actual amount of experience.

The College is to identify the minimum amount and type of experience appropriate for the position based upon the College’s recruitment requirements.

Experience required at the point of hire. Up to and including:

- |  |                                   |
|--|-----------------------------------|
| <input type="checkbox"/> 0 – no experience | <input type="checkbox"/> 3 years  |
| <input type="checkbox"/> 1 month           | <input type="checkbox"/> 5 years  |
| <input type="checkbox"/> 3 months          | X 7 years                         |
| <input type="checkbox"/> 6 months          | <input type="checkbox"/> 9 years  |
| <input type="checkbox"/> 1 year            | <input type="checkbox"/> 12 years |
| <input type="checkbox"/> 18 months         | <input type="checkbox"/> 15 years |
| <input type="checkbox"/> 2 years           | <input type="checkbox"/> 17 years |

- 7 years progressive experience in professional fundraising, with a focus on major gifts. University or College fundraising and major campaign experience an asset.

Specify and describe any specialized type of work experience necessary to fulfil the requirements of the position.

- Demonstrable experience in soliciting major gift and in-kind donations
- Experience in developing and maintaining an annual giving program
- Experience with planned giving
- Experience with capital campaigns in a University or College setting would be an asset
- Ability to create and achieve ambitious targets/goals
- Exceptional networking, listening and negotiating skills with the ability to build trust and elicit confidence with donors/donor prospects, corporate representatives, staff and senior fundraising volunteers
- Well-developed interpersonal and relationship building and management skills; ability to establish rapport and excellent communications with donors/donor prospects, staff and volunteers
- Excellent written and oral communications skills; comfortable with making presentations
- Strong problem-solving and analytical skills; proactive, creative, self-starter
- Ability to handle a large volume of work under pressure and with deadlines
- Experience working with Raiser’s Edge database to develop reports to support donor cultivation, solicitation, stewardship and recognition efforts
- Ability to work independently and manage time efficiently.
- A vehicle, or access to a vehicle, to meet with donors
- Must possess a valid driver’s license

### 4. INITIATIVE – INDEPENDENCE OF ACTION

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Initiative – Independence of action refers to the **amount of responsibility** inherent in a position and the **degree of freedom** that an incumbent has to **initiate** or **take action** to complete the requirements of the position. An incumbent is required to foresee activities and decisions to be made, then take the appropriate action(s) to ensure successful outcomes. This factor recognizes the established levels of authority which may restrict the incumbent's ability to initiate or take action, e.g., obtaining direction or approval from a supervisor, reliance on established procedures/methods of operation or professional practices/standards, and/or built-in controls dictated by computer/management systems.

Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform using their initiative without first having to obtain direction or approval from a supervisor.

1. Initial undertaking and managing of significant new opportunities for the development of major resources for the College.
2. The incumbent is responsible for determining methods and procedures, implementing and monitoring annual campaign fundraising strategies to achieve the goals and objectives required to secure gifts as outlined in the annual plan. Also responsible for evaluating the effectiveness of the methods and procedures used to secure gifts throughout and at the conclusion of each year.
3. Direct staff in the timeliness and accuracy of gift receipts to donors, as well as benchmarks and reports of gift receipting production in accordance with CRA standards.

Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform which required the direction or approval from a supervisor.

1. Authorization of extraordinary or non-budgeted expenditures
2. Hiring/discipline/termination of full time staff positions supervised by incumbent
3. Situations in which potential/actual legal action occurs

Give specific examples of guidelines, procedures, manuals (formal or informal), computer systems/programs that are used in performing job duties and in making decisions, e.g., Government regulations, professional or trade standards, College policies or procedures, department or program procedures, computerized/manual programs/systems and any other defined methods or procedures.

- Fleming College Strategic Plan
- College Procedure Manual
- Support Staff Collective Agreement
- Advancement & Alumni Relations Donor Recognition Policies & Procedures
- Capital Campaign Donor Recognition Opportunities & Benefits of Giving
- Association of Fundraising Professionals Code of Ethics
- Imagine Canada Ethical Fundraising Standards & Guidelines
- Canada Revenue Agency taxation regulations with reference to charitable donations
- Naming policy
- Canada Revenue Agency – Charities and Giving Guidelines
- Donor Stewardship and Recognition procedures
- Gift and Donation procedures, regulations and ethical standards
- Freedom of Information and Protection of Privacy Act
- Employment Standards Act
- Fleming College Policies and Procedures
- Student Rights and Responsibilities Policies

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### 5. POTENTIAL IMPACT OF DECISIONS

Potential Impact of Decisions recognizes the **potential consequences** that **errors in judgement** made by an incumbent, despite due care, could have on the College. Usually, the higher the level of accountability inherent in a position, the greater the potential consequences there are on the College from errors in judgement.

Give up to three examples of the typical types of errors in judgement that an incumbent could make in performing the requirements of the position. Do not describe errors which could occur as a result of poor performance, or ones that are rare or extreme. Indicate the probable effects of those errors on the College, e.g., loss of reputation of program/College, waste of resources, financial losses, injury, property damage, affects on staff, students, clients or public.

1. Inappropriate or misinformed leadership of resource development strategies could result in loss of or diminished return of a major gift to the College; or, in effect, damage relationships with major College partners and subsequent deterioration of credibility and positive public relations, externally and internally. Such situations could seriously damage the financial viability of the Advancement & Alumni Relations Office and thereby place College projects, student enrolment and learning resources in jeopardy.
2. Engaging with an individual or organization that wishes to provide a gift for college initiatives, and failing to ask probing questions that will ensure compliance with Canada Revenue Agency Charity Directorate Guidelines. For example, failing to inquire as to the nature of the relationship between an individual engaged in providing the gift, and the intended recipient could contravene 'arms-length' rule by CRA, potentially jeopardizing the college's charitable status.
3. The incumbent could offer a recognition opportunity to a donor which would not be accepted by the college. The college could be held liable for a commitment which was not upheld.

**Job Fact Sheet Questionnaire**

**6. CONTACTS AND WORKING RELATIONSHIPS**

Contacts and Working Relationships refers to the **types, importance and intended outcomes** of the contacts and working relationships required by an incumbent to perform the responsibilities of a position. It also measures the skill level required to be effective in dealing with contacts and being involved in working relationships. This factor does **not** focus on the level of the contact, but on the nature of the contact.

Indicate by job title, with whom an incumbent is required to interact to perform the duties and responsibilities of the positions. Describe the nature, purpose and frequency of the interaction, e.g., exchanging information, teaching, conflict resolution, team consultation, counseling.

Contacts	Contacts by Job Title	Nature and Purpose of Contact	Frequency of Contact	
			Occasional	Frequent
Internal to the College, e.g., students, staff, management, colleagues	President	Cultivation and solicitation calls to donor prospects	X	
	VPA, Deans, Chairs	Defining funding opportunities		x
	VPA, Deans, Chairs, Faculty	Donor identification, development of cultivation and solicitation strategies		X
	Advancement Committees	Provide overview of plans and progress against goals	X	
External to the College, e.g., business and industry representatives, suppliers, advisory committee members, staff at other colleges, government officials, and general public.	General public, corporate and business leaders, foundations, special agencies, service clubs, etc.	Provide information and incentives to initiate partnerships to provide funding for capital equipment, infrastructure and student financial assistance. Obtain financial or in-kind support through persuasion and negotiation.		x

<b>Occasional (O)</b>	<b>Contacts are made once in a while over a period of time.</b>
<b>Frequent (F)</b>	<b>Contacts are made repeatedly and often over a period of time</b>



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### 7a. CHARACTER OF SUPERVISION/FUNCTIONAL GUIDANCE

**Character of Supervision** identifies the **degree and type** of supervisory responsibility in a position or the nature of functional/program supervision, technical direction or advice involved in staff relationships.

(√) Check the applicable box(es) to describe the type of supervisory responsibility required by an incumbent in the position:

- Not responsible for supervising or providing guidance to anyone.
- Provides technical and/or functional guidance to staff and/or students.
- Instructs students and supervises various learning environments.
- X Assigns and checks work of others doing similar work. (see below 1)
- X Supervises a work group. Assigns work to be done, methods to be used, and is responsible for the work performed by the group. (see below 2)
- X Manages the staff and operations of a program area/department.\*
- Manages the staff and operations of a division/major department.\*
- Manages the staff and operations of several divisions/major departments.\*
- Acts as a consultant to College management.
- Other e.g., counseling, coaching. Please specify:

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\* Includes management responsibilities for hiring, assignment of duties and work to be performed, performance management, and recommending the termination of staff.

Specify staff (by title) or groups who are supervised/given functional guidance by an incumbent.

1. Annual Giving & Communications Officer – for Annual Giving portion of their portfolio
2. Students working in Advancement & Alumni Office (1 to 3 students in P/T and F/T positions depending on time of year)

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**7b. SPAN OF CONTROL**

Span of Control is complementary to Character of Supervision/Functional Guidance. Span of Control refers to the total number of staff for which the position has supervisory responsibility, (i.e., subordinates, plus all staff reporting to these subordinates).

Enter the total number of full-time and full-time equivalent staff reporting through to the position. Also identify the number of staff for whom the position has indirect responsibility (contract for service), if applicable.

Type of Staff	Number of Staff
Full-Time Staff	1 support staff (Annual Giving & Communications Officer)
Non Full-Time Staff (FTE)*	Students working in Advancement & Alumni Office (1 to 3 students depending on time of year)
Contract for Service**	
Total:	1 FT, 1 FTE

\* Full-Time Equivalency (FTE) conversions for non full-time staff are as follows:

**Academic Staff**

Identify the total average annual teaching hours taught by all non full-time teachers (part-time, partial load and sessional) for which the position is accountable and divide by 648 hours for post secondary teachers and 760 hours for non post secondary teachers.

**Support Staff**

Identify the total average annual hours worked by part-time support staff for which the position is accountable and divide by 1820 hours.

**Administrative Staff**

Identify the total average annual hours worked by non full time administrative staff for which the position is accountable and divide by 1820 hours.

**\*\* Contract for Services**

When considering “contracts for services”, review the nature of the contractual arrangements to determine the degree of “supervisory” responsibility the position has for contract employees. This could range from “no credit for supervising staff” when the contracting company takes full responsibility for all staffing issues to “prorated credit for supervising staff” when the position is required to handle the initial step(s) when contract staffing issues arise.

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### 8. PHYSICAL AND SENSORY DEMANDS

**Physical/Sensory Demands** considers the **degree** and **severity** of exertion associated with the position. The factor considers the intensity and severity of the physical effort rather than the strength or energy needed to perform the task. It also considers the sensory attention required by the job as well as the frequency of that effort and the length of time spent on tasks that cause sensory fatigue.

Identify the types of physical and/or sensory demands that are required by an incumbent. Indicate the frequency of the physical demands as well as the frequency and duration of the sensory demands. Use the frequency and duration definitions following the tables to assist with the descriptions.

#### PHYSICAL DEMANDS

Describe the types of activities and provide examples that demonstrate the physical effort that is required in the position on a regular basis, i.e., sitting, standing, walking, climbing, lifting and/or carrying light, medium or heavy objects, pushing pulling, working in an awkward position or maintaining one position for a long period of time.

Types of Activities that Demonstrate Physical Effort Required	Frequency (note definitions below)				
	Occasional	Moderate	Considerable	Extended	Continuous
Sitting, extensive computer work		X			
Standing		X			
Walking		X			
Lifting/Carrying Objects	X				

#### SENSORY DEMANDS

Describe the types of activities and provide examples that demonstrate the sensory effort that is required in the position on a concentrated basis, i.e., reading information/data without interruption, inputting data, report writing, operating a computer or calculator, fine electrical or mechanical work, taking minutes of meetings, counseling, tasting, smelling etc.

Types of Activities that Demonstrate Sensory Effort Required	Frequency (note definitions below)					Duration
	Occasional	Moderate	Considerable	Extended	Continuous	Short Intermediate or Long
Reading		X				S
Report/Proposal/ Correspondence			X			S
Data and spreadsheet analysis		X				S
Counselling/Coaching Staff & Associates		X				S
Listening/speaking (Attending meetings)		X				I

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**FREQUENCY:**

Occasional:	Occurs once in a while, sporadically.
Moderate:	Occurs on a regular, ongoing basis for up to a quarter of the work period.
Considerable:	Occurs on a regular, ongoing basis for up to a half of the work period.
Extended:	Occurs on a regular, ongoing basis for up to three-quarters of the work period.
Continuous:	Occurs on a regular, ongoing basis throughout the entire work period except for regulated breaks.

**DURATION:**

Short:	Up to one hour at a time without the opportunity to change to another task or take a break.
Intermediate:	More than one hour and up to two hours at a time without the opportunity to change to another task or take a break.
Long:	More than two hours at a time without the opportunity to change to another task or take a break.

**9. WORKING CONDITIONS**

**Working conditions** considers the frequency and type of exposure to undesirable, disagreeable environmental conditions or hazards, under which the work is performed.

Describe any unpleasant environmental conditions and work hazards that the incumbent is exposed to during the performance of the job.

**Environment**

Describe the types of activities and provide examples that demonstrate exposure to unpleasant environmental conditions in the day-to-day activities that are required in the job on a regular basis, e.g., exposure to dirt, chemical substances, grease, extreme temperatures, odours, noise, travel, verbal abuse, body fluid, etc. Indicate the activity as well as the frequency of exposure to undesirable working conditions.

Types of Activities that Involve Job Related Unpleasant Environmental Conditions	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
Travel to campuses, businesses, external meetings, more than twice per week and on occasion out of town.		X	
Evening and weekend work	X		

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### Hazards

Describe the types of activities and provide examples that demonstrate the hazards in the day-to-day activities that are required in the job on a regular basis, e.g. chemical substance, electrical shocks, acids, noise, exposure to infectious disease, violence, body fluids, etc. Indicate the activity as well as the frequency of exposure to hazards.

Types of Activities that Involve Job Related Hazards	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
Not applicable			

### Frequency:

Occasional	Occurs once in a while, sporadically.
Frequent	Occurs regularly throughout the work period.
Continuous	Occurs regularly, on an ongoing basis, throughout most of the work period.

Additional Notes Pertaining to this Position: