

# 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 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 JF will be provided to the incumbent for information purposes and as a job description.

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### POSITION IDENTIFICATION:

<b>Position Title:</b>	Senior Development Officer
<b>Position Number:</b>	
<b>Pay Band:</b>	9
<b>Incumbent:</b>	VACANT
<b>Location/Campus:</b>	Sutherland
<b>Division/Department:</b>	Economic & Community Development
<b>Immediate Supervisor (title):</b>	Director, Advancement & Alumni Relations
<b>Date of JFS:</b>	February 24, 2021
<b>Last Evaluated:</b>	February 25, 2021

### Type of Position:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Administrative | <input type="checkbox"/> Administrative (Temporary position, two years) |
| <input type="checkbox"/> Sessional Academic        | <input type="checkbox"/> Part-time Administrative                       |
| <input type="checkbox"/> Part-Time Support         | <input type="checkbox"/> Part-Time Academic                             |
| <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 Senior Development Officer is responsible for engaging with alumni and donors to inspire increased major gifts to Fleming College. Funding is to be secured through philanthropic and grant proposals made to private corporations, organizations, foundations, and individuals including alumni and community members.

The incumbent 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 for a number of Schools at Fleming College. Fundraising projects include a variety of strategic College priorities, including student financial support, program and research support, gift in kind, and building campaigns.

The incumbent actively participates in department strategy development, alumni relations, and sound information management through Raisers Edge. They work closely with the Dean(s)/academic leader(s) and their office to enhance School engagement with alumni and donors.

### KEY DUTIES

	<b>% Of Time</b>
<b>1. Fundraising and Grant Writing</b>	<b>70%</b>
<ul style="list-style-type: none"><li>• Manages a diverse portfolio of 100 + major gift prospects at various relationship stages (e.g. cultivation, solicitation and stewardship). Prospects managed by the incumbent will be rated at a major gift level from \$10,000+.</li><li>• Responsible for securing \$250,000 + in contributions annually through cash or gift in kind donations, grants, and sponsorships.</li><li>• Prepares 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.</li><li>• Prepares, writes and submits customized applications and gift proposals. Negotiates and brings solicitations to closure, both independently and in conjunction with senior administrators. This includes the preparation of gift agreements, in conjunction with the unit head(s), finance, and legal counsel, if necessary.</li><li>• Negotiates and secures gifts-in-kind for various programs to help offset capital asset purchases needed by the college.</li><li>• Ensures recognition and thorough stewardship of donors including follow-through on the gift implementation, administration of the funds and related expenditures.</li><li>• Supports donor cultivation and recognition events, as required.</li></ul>	
<b>2. Prospect Research, Operations &amp; Database Management</b>	<b>10%</b>
<ul style="list-style-type: none"><li>• Identifies and qualifies potential funders to the College; either individuals, private foundations, corporations or publicly-funded organizations.</li><li>• Maintains 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, The Association of Fundraising Professionals and Imagine Canada's Fundraising Code of Ethics.</li></ul>	

## Job Fact Sheet Questionnaire

- Tracks 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.)

**3. *Coordination of stakeholders and financial information for applications* 10%**

Under the guidance of the Director, Advancement and Alumni Relations:

- Helps to gather program background on funding priorities of the College in order to prepare project proposals.
- Reviews granting guidelines and online proposal application guidelines and corresponds with staff and faculty involved in projects for which we are seeking funding. Prepares project budgets including pricing out items such as travel, workshops/conferences/seminars, staff and student support, equipment, etc.

**4. *Other Duties as assigned* 10%**

- Performs other related duties as assigned by Director, Advancement and Alumni Relations.

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**TOTAL: 100%**

## Job Fact Sheet Questionnaire

### 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. Assesses major gift opportunities to address College priorities – the incumbent must have an in-depth understanding of donor need and interest as well as College programs and priorities to ensure a good fit.
2. Determines how to best utilize data from Raisers Edge, analyzes results, identifies gaps and strengths and applies reasoning to modify strategy as appropriate
3. Determines 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. Determines how to deal with complaints and how to resolve disputes and recognizes when a major issue should be brought to the attention of senior management.

## Job Fact Sheet Questionnaire

### 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  
 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 preferred in relevant discipline such as marketing, fundraising, communications, sales or business.

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

- Certified Fund Raising Executive (CFRE) designation preferred.

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)

- Five years of experience in senior-level major gift fundraising with a proven track record involving face-to-face cultivation, solicitation and relationship management. Experience in higher education fundraising desirable.
- Excellent relationship builder with exceptional interpersonal and communication, networking, and negotiating skills. Demonstrated ability to interact comfortably and professionally with a wide range of internal and external constituents such as staff, volunteers, donors, and alumni.
- Experience working with and motivating senior level leaders, volunteers, and board members is essential.
- Superior written communication and proposal writing skills with attention to detail.
- Effective project management, organizational, and analytical skills with ability to independently monitor and meet goals that align with department business plans.
- Capacity to exercise sound judgment and discretion and maintain confidentiality.
- Proven capacity to take initiative, be proactive, and meet deadlines.
- Excellent problem solving skills.

## Job Fact Sheet Questionnaire

- Demonstrated computer skills in Microsoft Suite including Word, Excel, PowerPoint, MS-Access, Publisher.
- Experience with Raiser's Edge software to support fundraising efforts and tracking of moves management and strong prospect research skills.

### 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"/> 4 years            |
| <input type="checkbox"/> 1 month           | <input checked="" type="checkbox"/> 5 years |
| <input type="checkbox"/> 3 months          | <input type="checkbox"/> 7 years            |
| <input type="checkbox"/> 6 months          | <input type="checkbox"/> 9 years            |
| <input type="checkbox"/> 1 year            | <input type="checkbox"/> 11 years           |
| <input type="checkbox"/> 18 months         | <input type="checkbox"/> 13 years           |
| <input type="checkbox"/> 2 years           | <input type="checkbox"/> 15 years           |
| <input type="checkbox"/> 3 years           | <input type="checkbox"/> 17 years           |

- 5 years of 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 successfully soliciting major gifts.
- Demonstrable experience preparing private proposals and grant applications.
- 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 with donors/donor prospects, staff and volunteers.
- Strong communication, research and analytical skills. Effective interpersonal skills, including the capacity to work effectively with faculty members and external stakeholders.
- Excellent written and oral communications skills; exact attention to detail for writing and understanding appropriate interpretation of grants.

## Job Fact Sheet Questionnaire

- Strong and effective presentation skills.
- 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 as well as in a team 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

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. Conducts research to identify and qualify potential funding opportunities from private sources.
2. Cultivates prospective donors and moves them into the solicitation stage effectively in order to present and submit strategically appropriate funding requests. Requests are in the form of grants and gifts from private industry, foundations and individuals.
3. Stewards donors effectively and creatively to ensure a long-term positive relationship with the College. This takes many forms from timely gift receipting to donor recognition events.

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. Setting funding priorities for the College
2. Authorization of extraordinary or non-budgeted expenditures
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

## Job Fact Sheet Questionnaire

- 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

### 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, effects 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 - 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. Failure to follow appropriate Privacy regulations could cause legal action, financial loss to the College, and loss of reputation.

### 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.

## Job Fact Sheet Questionnaire

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	Director, Advancement & Alumni	Providing data for development of donor prospect proposals; making strategic recommendations; analyzing constituent data; discussing reporting requirements		X
	President	Engaging in donor calls	X	
	VPA, Deans, Chairs, Faculty	Engaging in donor calls		X
	Advancement, Alumni, Marketing staff	Day-to-day operations and processes related to development activities		X
External to the College, e.g., business and industry representatives, suppliers, advisory committee members, staff at other colleges, government officials, and general public.	Corporations; Foundations; Individuals; Alumni; special agencies, service clubs, etc.	Proposals and submissions for donations and grants		X
	Other Colleges	Collaborating; best practice/information sharing etc.	X	

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

### 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.

## Job Fact Sheet Questionnaire

- Assigns and checks work of others doing similar work.
- Supervises a work group. Assigns work to be done, methods to be used, and is responsible for the work performed by the group.
- 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 senior 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.

Positions provides functional guidance to Advancement Services and Alumni Officers as well as Office Admin work study students.

## Job Fact Sheet Questionnaire

### 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	0
Non Full-Time Staff (FTE)*	
Contract for Service**	
Total:	0

\* **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.

## Job Fact Sheet Questionnaire

### 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

## Job Fact Sheet Questionnaire

### 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		

## Job Fact Sheet Questionnaire

### 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: