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## THE POST

<b>College /Service:</b>	<b>Global Advancement</b>
<b>Post:</b>	<b>Head of Philanthropy</b>
<b>Reference No:</b>	<b>P59769</b>
<b>Grade:</b>	<b>Grade H</b>
<b>Location</b>	<b>Exeter</b>
<b>Reporting To:</b>	<b>Director of Global Advancement</b>
<b>Responsible For:</b>	<b>5 members of staff within a team of 17</b>

### Job description

The University of Exeter is ranked among the top 1% of universities in the world. A member of the prestigious *Russell Group*, the leading research-intensive universities in the UK, it is recognised for the high quality of its research and was recently awarded Gold in the Teaching Excellence Framework (TEF). In February 2017, the University launched publically its most ambitious fundraising Campaign to date, '[Making the Exceptional Happen](#)', which aims to secure £60 million of new philanthropic funds, as well as securing 60,000 volunteer hours from 6,000 supporters by 2020. An exciting opportunity now exists for a talented and resilient individual to lead the Philanthropy Team in the Global Advancement directorate in a permanent capacity as Head of Philanthropy. S/He will play a crucial role in the successful delivery and management of the Campaign.

### Key relationships

Director of Global Advancement, Head of Principal Gifts (UK and Asia); Head of Supporter Engagement, Head of Operations; Directors of College Operations; Pro Vice-Chancellors and other senior academics; Chair of the University of Exeter Campaign Board; Chair of the University of Exeter Alumni Network Group; Directors of the University of Exeter US Foundation (501c3), Senior Development Managers and Head of Development (Medical School)

### Purpose

The Head of Philanthropy is a senior post within Global Advancement. The key objectives for this post are to lead, motivate and manage the Philanthropy Team, so that they deliver against individual and overall fundraising targets, ensuring that their performance is guided by best practice and amongst the top 10 of UK universities; to work with the Director of Advancement, Head of Principal Gifts (Asia and UK), Senior Development Managers and the Head of Development (Medical School), to further develop and implement fundraising strategies associated with the delivery of key Campaign themes to ensure that there is a sustained sense of Campaign momentum from the public phase of the Campaign, to the close and beyond, and to manage personally a portfolio 20-30 prospects (UK based individuals and Trusts and Foundations), with the intention of securing Principal and Major-level gifts, while providing exemplary levels of donor stewardship. The successful candidate will spend a significant amount of time providing leadership to the existing fundraising team and the development of specific fundraising strategies.

The post holder will have a high profile within and beyond the University. They will deputise for the Director of Global Advancement as required. They will work closely with the Head of Principal Gifts (UK and Asia), Head of Supporter Engagement, Head of Operations, Campaign Board Chairman, academic colleagues and senior

University leaders as required. They will be expected to use their own initiative and to take high level decisions in order to ensure the effective delivery of fundraising targets for the Philanthropy Team.

## **1 KEY CRITERIA FOR SUCCESS**

After 12 months in post, the successful candidate will have:

- Become an established and respected member of Global Advancement and the wider University and gained credibility through excellent leadership of the Philanthropy Team with a reputation for delivery
- Have demonstrated exemplary leadership skills and formed positive working relationships with the Director, all key relationships, as well as all direct reports
- Demonstrated successful delivery against the University of Exeter 'Making the Exceptional Happen' Campaign objectives and Philanthropy Team targets.
- Ensured that fundraising opportunities continue to be maximised through the public phase of the Campaign by working with colleagues to develop new fundraising products and donor cultivation opportunities.
- Personally met and/or exceeded their own fundraising targets (financial and activity/ meeting targets) as agreed with the Director on an annual basis. Have created a pipeline of prospects, with cultivation and solicitation plans, to secure delivery of principal and major level gifts
- Developed appropriate professional relationships with all key constituencies in the University i.e. senior management teams centrally and in Colleges, academics and the Campaign Board and advisors.
- Proven themselves as a credible leaders of a high performing Philanthropy Team with demonstrable progress on delivery against all Campaign themes (Sustainable Futures, Health, Tomorrow's Leaders, Society and Culture), and associated fundraising strategies including: (Camborne School of Mines, Global Systems Institute, University of Exeter Medical School, Living Systems Institute, Cornwall Strategy, Trusts and Foundations Strategy, Legacy and Endowment Strategy, Stewardship Strategy, as well as the Arts and Culture Strategy).
- Worked with the Head of Principal Gifts (UK and Asia) to ensure that the Campaign fundraising and engagement strategy for Asia, is integrated into overall Campaign planning.
- Established good working relations with staff in Colleges and Institutes, ensuring their fundraising priorities are integrated seamlessly with centrally managed fundraising functions.
- Delivered key aspects of the Campaign Plan, with particular focus on: integrated working with the directorate of Innovation Impact and Business; produced simple and compelling campaign products; and engaged academic champions.
- Developed and upskilled members of the Philanthropy Team on an individual and team basis, through mentoring in one to one meetings and by overseeing and implementing 'LEAP' an internal team training programme in order that they can deliver to the best of their ability and continue to develop
- Created and implemented an internal institutional programme 'Leaders in Development,' i.e. senior faculty, Professional Services and Vice-Chancellor's Executive Group staff which supports senior staff in their efforts to engage in the advancement process by building awareness of best practice, sharing knowledge and experience.
- Delivered on individual fundraising targets as agreed with the Director of Global Advancement.

## **2. KEY RESPONSIBILITIES**

### **a) Leading the Philanthropy Team**

- Establish philanthropy as a key institutional priority included within the University of Exeter Strategy and delivered through cross-institutional operational plans.
- Lead the Philanthropy by example, working to best practice at all times
- Further develop the Philanthropy Team by building a successful programme of cross-University Trust fundraising, expanding and strengthening Individual Major Gift fundraising across the University and ensuring all fundraising is underpinned by top quality research and intelligence.
- Establish effective College/Service fundraising functions driven by best practise and aligned with central fundraising functions under the umbrella of the new Campaign.
- Lead the Philanthropy Team and ensure delivery of all Philanthropy objectives within the Campaign Plan and individual Performance Development Reviews (PDR's).

## **b) People Management**

- Manage and lead the Philanthropy Team of 17 individuals, with direct line management responsibility for the Senior Development Manager (International); Senior Development Manager (Sustainable Futures); Senior Development Manager (Society and Culture); the Head of Development (Medical School) and Philanthropy Administration Assistant
- Manage the performance and regular appraisal of staff within the team ensuring that their work supports planned fundraising activity and agreed objectives and includes appropriate professional development.
- Work with the Director of Advancement to make any team structural changes as required and undertake future recruitment and selection.
- Ensure compliance with University policies and procedures (including reputational and ethics), the Institute of Fundraising Codes of Practice, relevant data and fundraising legislation.
- Celebrate success to ensure a positive working environment and manage any underperformance across the team in keeping with HR policies' to ensure optimum performance.
- Promote fundraising best practice and keep abreast of industry changes and developments through relevant continuing professional development.

## **c) Campaign Delivery**

- Working with the Director of Global Advancement, Head of Principal Gifts (UK and Asia), Head of Operations and Head of Supporter Engagement, deliver the Campaign Plan and secure buy-in across the University and from the Campaign Board.
- Oversee the relationship management of Campaign Board members (working with lead and co-lead canvassers where appropriate), to ensure the implementation of the Campaign Plan, monitoring progress and identifying action needed to achieve the Campaign goals.
- Support the Campaign Board and ensure that they have the information, tools and internal relationships needed to fulfil their remit.
- Manage and coordinate the internal training programme (LEAP).
- Work with the Head of Principal Gifts (UK and Asia) to ensure that the strategy and key objectives for successful fundraising in Asia, are integrated into overall campaign planning and that other planned cultivation activities in the UK and US, are always complimentary and considered as part of a holistic overall plan.

## **d) Fundraising Management and Development**

- Contribute towards the development of strategic cultivation plans for major prospects and personally manage a prospect pool of potential major donors, in a mix of individuals and Trusts and Foundations.
- Manage with the Philanthropy Team to diversify income streams by developing new fundraising products and initiating fundraising with new audiences. Particularly focus on developing and integrating an effective fundraising model to successfully solicit new funds from Trusts and Foundations.
- Establish Philanthropy Team objectives, targets, KPI's and a team delivery plan each year.
- Benchmark and report against relevant Campaign KPIs.
- Work with the Head of Operations and Prospect Research Manager to ensure that there are sufficient individual and trust prospects to reach Campaign targets.
- Work with the Supporter Engagement Team and Operations Team to ensure that:
  - Effective stewardship and gift administration is in place.
  - Alumni data is optimised for fundraising and Raisers Edge is used effectively
  - There are sufficient events and volunteering opportunities to enable prospect cultivation
  - Campaign communications meet the needs of the Philanthropy Team.
  - Philanthropic income is reported effectively throughout the University.
- Ensure that effective training is offered to all fundraisers, staff and volunteers.
- Attend University functions in the UK and work outside normal office hours where needed.
- Undertake other roles commensurate with his/her grade and experience.

#### **e) Liaison and Cross Team/Office Working**

- Act with delegated authority on behalf of the Director of Global Advancement in compliance with University policies and protocols and as appropriate/requested at functional and organisational level and externally. Attend meetings or represent the Director of Global Advancement as and when required.
- Develop and maintain supportive working relationship with all colleagues in Global Advancement. Participate actively in Departmental Team meetings and develop good working relationships with other University departments to assist the delivery of shared objectives and encourage other teams to generate support and awareness.
- Lead and participate in project/working groups as requested by the Director of Global Advancement.

#### **f) Planning and Budget Management**

- Manage the Philanthropy team.
- Monitor and report on performance to the Head of Operations and Director of Global Advancement.

### **3. PERSON SPECIFICATION**

#### **a) Experience and knowledge**

- Essential - Significant personal success in securing six figure philanthropic gifts (or higher) in Higher Education, the voluntary or arts and culture sectors through his/her own endeavours
- Essential - Some previous management experience in a fundraising context
- Essential - In-depth knowledge of funding sources and potential revenue streams
- Essential Experience of developing and implementing fundraising strategies successfully
- Essential - Experience of developing successful new fundraising products and fundraising literature
- Essential - Outstanding written and presentation skills
- Essential - Experience of providing training and coaching in fundraising
- Essential - Experience of budget management
- Essential - Sophisticated communication, networking and negotiating skills and experience of working with senior decision makers both internally and externally
- Essential - Social skills appropriate to representing the University to national and international figures of influence and affluence
- Essential - Sufficient knowledge, experience and skills in IT, including Microsoft Office applications, databases; e-mail systems in order to be administratively self sufficient
- Essential - Excellent influencing and networking skills gained through working with distinguished individuals in both business and social contexts, both face to face and remotely
- Essential - Ability to communicate persuasively and effectively, both in writing and orally and an understanding of the importance of maintaining appropriate boundaries and levels of confidentiality
- Essential - Strong people and team management skills and the ability to build trust and productive relationships quickly with internal and external stakeholders
- Essential - Problem solver, especially in new situations and ability to find innovative solutions in a competitive and challenging fundraising market
- Desirable - Experience of developing, launching and completing fundraising campaigns successfully
- Desirable - Experience of working in a team as a leader and managing and developing a team of high achievers, whilst working as a contributing member of a wider team
- Desirable - Experience of successfully leading a similar size team in a target driven
- Desirable - Experience of managing a complex budget and delivering best value
- Desirable - Experience of working with Boards and Trustees

## **b) Attitudes and Values**

- Values based approach to fundraising and belief in the power of education and philanthropy to transform lives
- Ambitious and target driven
- Honest, transparent and driven by a sense of integrity
- Personable with positive attitude and enthusiasm
- Consultative approach to problem solving
- Customer service orientated
- Comfortable with providing leadership, taking initiative, thinking creatively and showing genuine commitment to the University
- Completer-finisher with strong fundraising and management instinct, demonstrable fundraising acumen and capacity for progressing sometimes competing and complex tasks
- Genuinely interested in building and developing teams and managing staff development
- Resilient and determined and able to work flexibly and embrace change
- A genuine commitment to educational excellence and able to work effectively with students, staff and alumni and an understanding of equality and diversity and how it affects this position, the organisation and supporters
- Self-motivated, with the ability to show initiative and organise and prioritise own workload and think through solutions to problems independently
- Willingness to be flexible about hours and location of work in order to accommodate events and functions. The role requires some travel, late nights and overnight stays.

### **Terms & Conditions**

Our Terms and Conditions of Employment can be viewed [here](#).

### **Further Information**

Please see our [website](#) for further information on working at the University of Exeter.