

# Job Fact Sheet Questionnaire

## 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.

#### POSITION IDENTIFICATION

DATE: June 8, 2023

**College:** St. Lawrence College  
**Incumbent:** Vacant  
**Position Title:** Development Officer, Leadership Giving  
**Position #:**  
**Classification:** Payband 8  
**NOC Code:**  
**Division/Department:** Alumni and Development  
**Location/Campus:** Tri-Campus  
**Immediate Supervisor (title):**

#### Type of Position:

Administrative  
   Part-Time Administrative  
   Sessional Academic  
   Part-Time Academic  
   Part-Time Support  
   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: \_\_\_\_\_

## Job Fact Sheet Questionnaire

**Approved by**

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

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

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## POSITION SUMMARY

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

Under the direction of the Director, Development and Alumni Relations, the Development Officer, Leadership Giving will play a key role in St. Lawrence College's fundraising efforts, including prospect qualification, and donor cultivation and stewardship for gifts \$1,000-24,999.

The incumbent will work with the Alumni and Development team to execute a data-driven fundraising strategy with the goal of steady and sustainable pipeline growth. The Development Officer, Leadership Giving, will be an advocate for philanthropy at the College and in the community, using strong interpersonal and communication skills to engage donors in support of the College's philanthropic priorities, including student awards and bursaries.

The Development Officer, Leadership Giving, will be an experienced relationship manager familiar with digital, phone and face-to-face fundraising practices. A successful incumbent will have excellent interpersonal skills, exceptional teamwork focus, strong time management and organizational skills, and will demonstrate a commitment to SLC values.

## KEY DUTIES

**Provide a description of the position's key duties. Estimate the percentage of time spent on each duty (to the nearest 5%). Add an extra page if necessary.**

| <u>KEY DUTIES</u>   | <u>% OF TIME</u> |
|---|------------------|
| <b>1. Front-line fundraising</b>  | <b>(75%)</b>     |
| <ul style="list-style-type: none"><li>▪ Builds and manages a portfolio of prospective donors with capacity ratings up to \$24,999. Determines donor interests and alignment with College priorities.</li><li>▪ Communicates regularly with a high volume of donors and prospects to strengthen connections and leverage existing relationships for increased engagement</li><li>▪ Works with the Associate Director, Development, Manager, Advancement Services, College leadership, and other donors and volunteers to identify new prospects, based on connection and capacity to give</li><li>▪ Enacts fundraising strategy in support of special campaigns, key projects, reunions and events</li><li>▪ Supports Annual Giving solicitations, renewals and upgrades</li><li>▪ Achieves fundraising targets through a combination of approaches (digital, phone, face-to-face) and monitors progress to goal</li><li>▪ Files contact reports and updates constituent records in Raiser's Edge database</li></ul> |                  |

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- Maintains familiarity with Canada Revenue Agency guidelines pertaining to charitable giving and understands implications
- Subscribes to the Association of Fundraising Professionals Donor Bill of Rights and Code of Ethical Standards

### 2. Donor stewardship

(25%)

- Ensures donors are thanked, appropriately recognized and stewarded to encourage ongoing support
- Responds to donor requests in a timely manner while upholding confidentiality
- Develops and deploys digital stewardship communications

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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.

- a) Determining the best methods of approaching, cultivating and strengthening connections with prospective donors. Allocation of time and resources to ensure a high rate of return on outreach efforts.
- b) Assessing donor capacity and affinity for escalation to Major Giving. Identifying affinity for Planned Giving.
- c) Ensuring prospects are qualified and donors are stewarded in a balanced and sustainable manner for long-term pipeline growth

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### 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.

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.

#### 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:

#### A) Specify and describe any program speciality, certification or professional designation necessary to fulfil the requirements of the position.

Two-year diploma or a post-graduate certificate in Fundraising or Volunteer Management. CFRE designation is an asset.

#### B) 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).

- Excellent relationship-building skills with strong oral and written communication.
- Demonstrated ability to inspire, influence and engage stakeholders.
- Strong networking, negotiating and listening skills with experience in creative problem solving
- Effective organizational and time management skills with the ability to prioritize a high-volume workload, handle multiple task assignments/responsibilities and meet critical deadlines
- Proficient with computer applications (MS Office Suite) and fundraising software (Raiser's Edge)

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### 3. EXPERIENCE (to be completed by the College)

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"/> no experience required | <input checked="" type="checkbox"/> 4 years |
| <input type="checkbox"/> 3 months               | <input type="checkbox"/> 5 years            |
| <input type="checkbox"/> 6 months               | <input type="checkbox"/> 7 years            |
| <input type="checkbox"/> 1 year                 | <input type="checkbox"/> 9 years            |
| <input type="checkbox"/> 18 months              | <input type="checkbox"/> 11 years           |
| <input type="checkbox"/> 2 years                | <input type="checkbox"/> 13 years           |
| <input type="checkbox"/> 3 years                | <input type="checkbox"/> 15 years           |
|   | <input type="checkbox"/> 17 years           |

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

The incumbent will be a skilled relationship-builder with experience in prospect identification, solicitation and stewardship, and with demonstrated success in meeting revenue targets.

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### 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.

**A) 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.**

- a) Donor calls: identification, cultivation and stewardship meetings with donors and prospects
- b) Constituent communication: responding to donor inquiries, concerns and complaints
- c) Data entry: timely and accurate filing of contact reports and information changes in database

**B) 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.**

- a) Setting annual and multi-year strategies, goals and objectives for financial support
- b) Determining fundraising projects for donor consideration
- c) Prospect clearance and adherence to policies and processes

**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.**

- AFP Code of Ethical Standards and Donor Bill of Rights
- College Policies and procedures
- College Strategic Plan, Departmental Business Plan, Strategic Mandate Agreement, Academic Plan, Global Engagement Plan
- FIPPA, CASL
- Familiarity with CRA regulations, charitable tax law, estate planning

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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.**

- a) Making promises to donors or prospects that cannot be fulfilled could result in poor donor relations, loss of donor confidence, diminished College reputation and institutional embarrassment and conflict
- b) Failure to follow appropriate CRA or privacy regulations could cause legal action, financial loss to the College, and loss of reputation.
- c) Misidentifying a donor's interests and preferences could result in an inappropriate or ineffective solicitation strategy and loss of support

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### 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, counselling.**

| Contacts  | Contacts by Job Title  | Nature and Purpose of Contact   | Frequency of Contact |          |
|---|--|---|----------------------|----------|
|   |  |   | Occasional           | Frequent |
| Internal to the College:  |  |   | Occasional           | Frequent |
| Internal to the college, e.g. students, staff, senior management, colleagues. | Director, Development and Alumni Relations (Direct Supervisor) | Works closely on goal-setting, progress monitoring and fundraising strategy   |                      | X        |
|   | Associate Director, Development                                | Close working relationship to ensure balanced pipeline growth and aligned fundraising efforts for moves management. Consult on fundraising strategies, stewardship messaging, proposal and case development, and gifts-in-kind. |                      | X        |
|   | Manager, Advancement Services                                  | Close working relationship to ensure database integrity is maintained. Consult on prospect identification, progress monitoring and analytics.   |                      | X        |
|   | Senior Development Officer                                     | Close working relationship to escalate qualified prospects and donors to the Major Gift level. Consult on fundraising and stewardship strategies.   |                      | X        |
|   | Other members of the Alumni and Development team               | Collaborate on and support event-specific and reunion-based fundraising initiatives. Collaborate on reporting, stakeholder engagement and organizational effectiveness within the team.   |                      | X        |
|   | Deans, Directors, Executive Team and Senior Leadership         | Working in support of identified philanthropic priorities and projects, engaging appropriate stakeholders for review, approval and donor stewardship when appropriate   | X                    |          |
|   | Risk and Contracts, Marketing, Communications,                 | A variety of interactions associated with effective fundraising including policy  | X                    |          |

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| Contacts  | Contacts by Job Title                         | Nature and Purpose of Contact   | Frequency of Contact |          |
|---|---|---|----------------------|----------|
|   | Government Relations                          | and legal review, donor recognition opportunities, public relations and media opportunities.  |                      |          |
|   |   |   |                      |          |
|   |   |   |                      |          |
| External to the College:  |   |   | Occasional           | Frequent |
| External to the college, e.g. suppliers, advisory committees, staff at other colleges, government, public/private sector. | Alumni, donors, community members, volunteers | Prospects and donors will be qualified, cultivated, solicited and stewarded for their support of the College                            |                      | x        |
|   | Other Colleges                                | Collaboration, best practices and information-sharing   | x                    |          |
|   |   |   |                      |          |
|   |   |   |                      |          |
|   |   |   |                      |          |
| <b>Occasional (O)</b><br><b>Frequent (F)</b>  |   | <b>Contacts are made once in a while over a period of time.</b><br><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.
- 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 management.
- Other e.g., counselling, coaching. Please specify:
  -

\* 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.**

- Volunteers
- Work placement students
- Functional guidance for academic partners for philanthropy under \$24,999

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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             | 0               |
| Non Full Time Staff (FTE) * | 0               |
| Contract for Service **     | 0               |
| <b>Total:</b>               | 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.

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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 at computer station for data entry, preparing solicitation plans, writing stewardship materials, etc.       |                                    |          | X            |          |            |
| Normal computerized office environment – standing, walking, bending to retrieve files, using office equipment, etc. |                                    |          | X            |          |            |
| Standing for events, presentations, donor activities  | X                                  |          |              |          |            |
| Driving to and from external donor meetings   | 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, counselling, 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 |
| Database updates and prospect research activities            |                                    |          | X            |          |            | I                          |
| Creating solicitation and stewardship materials              |                                    | X        |              |          |            | S                          |
| Interacting with internal and external                       |                                    |          |              | X        |            | L                          |

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| Types of Activities that Demonstrate<br>Sensory Effort Required | Frequency (note definitions below) |          |              |          |            | Duration                         |
|---|------------------------------------|----------|--------------|----------|------------|----------------------------------|
|   | Occasional                         | Moderate | Considerable | Extended | Continuous | Short<br>Intermediate<br>or Long |
| stakeholders, listening and speaking                            |                                    |          |              |          |            |                                  |

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### FREQUENCY:

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

### DURATION:

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

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### 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.

*Note on Travel: St. Lawrence College has adopted the following guidelines for travel. From the list below, please indicate which category best describes the travel required for the position.*

1. *Local travel on a regular basis up to 2 times per week.  
Out-of-town travel on a regular basis 1 – 2 times per month.*
2. *Local travel on a regular basis more than 2 times per week.  
Out-of-town travel 2 – 8 times per month.*
3. *Out-of-town travel on a regular basis more than 8 times per month.*

| Types of Activities That Involve Job Related Unpleasant Environmental Conditions. Include travel requirements (if any). | Frequency (note definitions below) |          |            |
|---|------------------------------------|----------|------------|
|   | Occasional                         | Frequent | Continuous |
| Local travel on a regular basis up to 2 times per week. Out-of-town travel on an occasional basis, 1-2 times per month. |                                    | x        |            |
| Attending alumni and donor events and meetings in a variety of settings   |                                    | 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:

|                   |  |
|-------------------|--|
| <b>Occasional</b> | Occurs once in a while, sporadically.                                      |
| <b>Frequent</b>   | Occurs regularly throughout the work period.                               |
| <b>Continuous</b> | Occurs regularly, on an ongoing basis, throughout most of the work period. |

### Additional Notes Pertaining to this Position:

Please save form in the following format: "Position Title – Department – Incumbent".  
 Please note formatting errors will be corrected if necessary.  
 To cursor from one entry point to the next please use the arrow keys or Tab.