



Candidate brief for the position of

DIRECTOR OF PRINCIPAL GIFTS

University of Oxford

10/10/2023

Company Overview

About the University of Oxford

Welcome to the University of Oxford. We aim to lead the world in research and education for the benefit of society both in the UK and globally. Oxford's researchers engage with academic, commercial and cultural partners across the world to stimulate high-quality research and enable innovation through a broad range of social, policy and economic impacts.

We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, while providing all our staff with a welcoming and inclusive workplace that enables everyone to develop and do their best work. Recognising that diversity is our strength, vital for innovation and creativity, we aspire to build a truly diverse community which values and respects every individual's unique contribution.

While we have long traditions of scholarship, we are also forward-looking, creative and cutting-edge. Oxford is one of Europe's most entrepreneurial universities and we rank first in the UK for university spin-outs, and in recent years we have spun out 15-20 new companies every year. We are also recognised as leaders in support for social enterprise.

Join us and you will find a unique, democratic and international community, a great range of staff benefits and access to a vibrant array of cultural activities in the beautiful city of Oxford.

For more information, please visit www.ox.ac.uk/about/organisation.

We encourage applicants from all sectors of the community and are keen to encourage candidates from under-represented groups to apply. The University has a number of staff networks including the Oxford Research Staff Society, BME staff network, LGBT+ staff network and a disabled staff network. For more information about equality-related networks for staff and students, please visit <https://edu.admin.ox.ac.uk/networks#/>

Development Office

The role of the University's Development Office is to help secure philanthropic support for the University. Led by Chief Development Officer, Liesl Elder, it works in partnership with academic and development colleagues throughout the collegiate University to build enduring relationships with external constituencies – including alumni, non-alumni, corporate and foundation donors – and to increase financial support for agreed academic priorities. In 2019, the University and the colleges completed the Oxford Thinking Campaign, which raised £3.34bn, and which is the most successful fundraising campaign in higher education in Europe. Oxford is currently in the advanced planning stages for its next comprehensive campaign.

For further information please visit: www.development.ox.ac.uk



The Role

Job Title	Director of Principal Gifts
Division	University Administration and Services
Department	Development Office
Location	University Offices, Wellington Square
Salary	Grade ALC6. Competitive salary
Hours	Full time
Contract Type	Permanent
Reporting to	Chief Development Officer
Additional information	Applications are particularly welcome and encouraged from black, and minority ethnic candidates, who are under-represented in posts in the Development Office. The Development Office is committed to equality and values diversity.

Overview of the role

This senior fundraising role reports to the Chief Development Officer and provides strategic leadership to, and management of, Oxford’s principal gifts team, who work on securing the largest philanthropic gifts to the University.

Key relationships: Senior members of the Development Office, Heads of the academic Divisions and Gardens, Libraries and Museum Directors, the Vice-Chancellor and Pro-Vice-Chancellors, Departmental and College development staff, senior academic and administrative staff as appropriate

Direct reports: Associate Directors of Principal Gifts (up to 7)
 Project Officer
 Personal Assistant



Purpose:

As a member of the senior leadership team in the University of Oxford Development Office (UODO), the Director of Principal Gifts will play an integral role in setting the strategic direction for the University's transformational fundraising initiatives by providing leadership and support for up to seven Principal Gifts staff based in Oxford. In addition, the post holder will manage his/her own portfolio of donors and prospects, and work directly with the Chief Development Officer and the Vice-Chancellor. The Director of Principal Gifts will play a crucial role in leading major gift fundraising for the University as Oxford prepares for its next multi-billion-pound campaign.

The post holder will be a part of the UODO Senior Leadership Team, which comprises:

- the Chief Development Officer
- the Executive Director of Development
- the Director of Principal Gifts
- the Director of Global Philanthropy
- the Director of Advancement Operations

The duties of the post are set out as they are envisaged at present, but it will be important for the person appointed to be flexible and adaptable, and able to contribute to the development of the fundraising function of the collegiate University. The work of the Development Office covers a wide range of activities and priorities which will inevitably change from day to day. All staff operate as a team, and, while each has his or her own responsibilities, they are expected to assist each other in peak periods. The post holder will need to become conversant with the University as a whole and especially with the numerous academic staff and volunteers.

The Chief Development Officer, as line manager, will regularly review progress. There may be opportunities for career development within the University Development structure and the Office seeks to support and encourage staff to help them reach their potential, providing access to appropriate courses and training whenever possible.



Development Office values

The Development Office culture is collaborative and service-oriented, and values transparency, flexibility, trustworthiness, tenacity, energy, drive and the ability to act as an ambassador for the office and for the collegiate University.

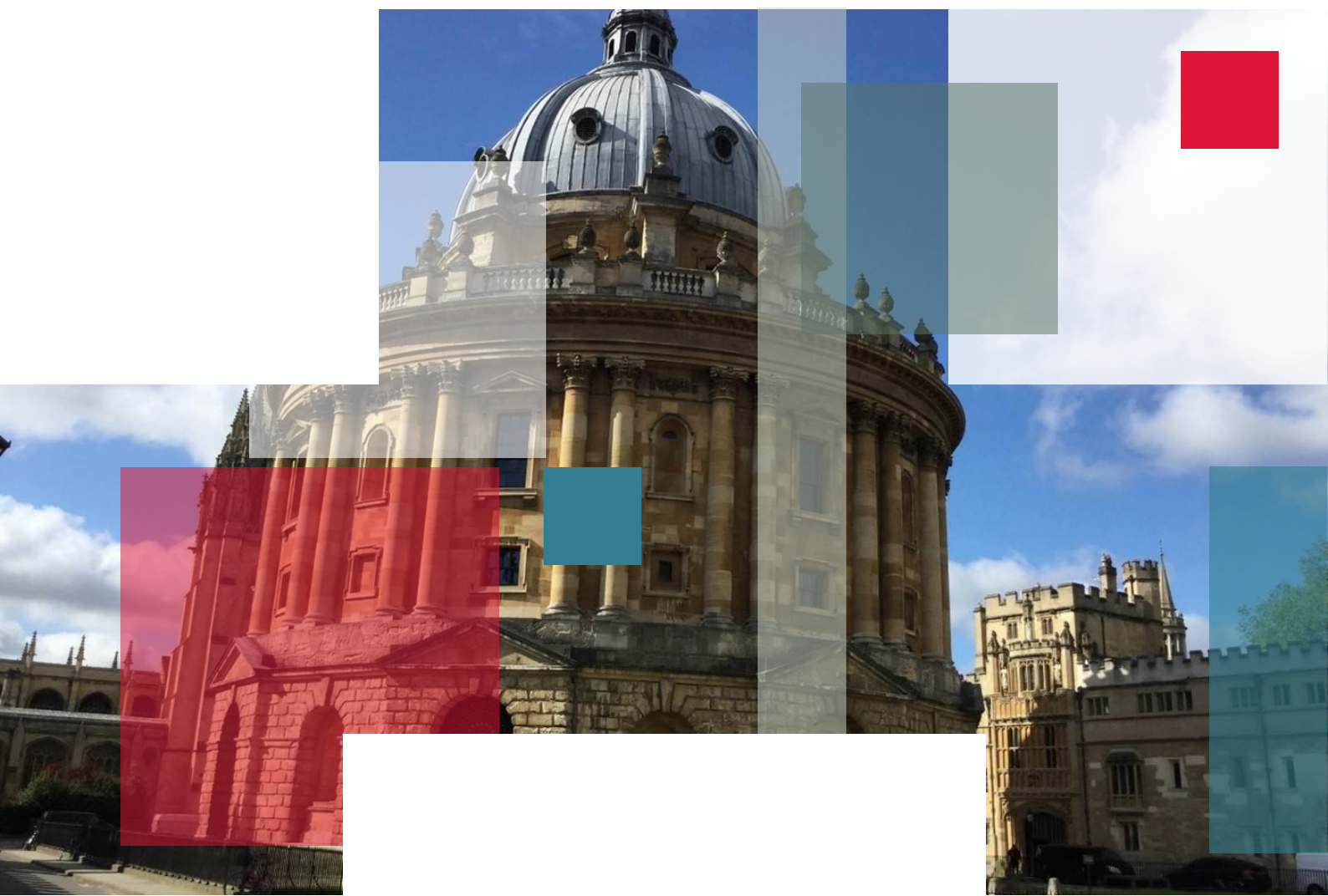
The following points lay down the foundations of the working ethos, culture and values of the Development Office. Aspirational and celebratory in turn, they provide a central framework for individual members of staff and teams, encouraging personal and professional growth.

We value each other – We respect the professional expertise of our colleagues. An approachable, friendly and kind office, we work in an environment where transparency of action and clarity of intent create openness and trust.

We work collaboratively – Whether within our own teams, across UODO, the collegiate University, or beyond, working collaboratively is second nature to us, and enables us to navigate complicated landscapes successfully.

We go beyond – We prize working with a high degree of autonomy and trust, and deliver a wide range of projects to the very highest standards. We are committed to personal, professional development.

We are part of something bigger – Our work supports the strategic priorities of the University of Oxford. We take pride in the contribution we – individually and collectively – make to the University.



Responsibilities

The post holder will report to the Chief Development Officer, and will work closely with the other members of the UODO Senior Leadership Team. The duties of the post are set out as they are envisaged at present, but it will be important for the person appointed to be flexible and adaptable, and able to contribute to the development of the fundraising function of the collegiate University.

The main duties and responsibilities of the post fall into four key areas:

Shaping University Development strategy

- As a member of the UODO Senior Leadership team, contributing to the enhancement and implementation of a development strategy for the University
- Coordinating, planning and implementing strategies for principal gift fundraising for institutional priorities, providing leadership and support to the direct line reports and the relevant University leadership team members

Managing principal gifts

- Working very closely with senior academic staff (Heads of Department, Heads of Division, PVCs) to secure principal gifts of £10m - £100m in support of academic priorities and new initiatives. This work requires exceptional tact and sensitivity, a nuanced understanding of the university and its complexities, the willingness to promote the university's position robustly in the face of challenging negotiations, an entirely collaborative approach, and an open and consistent style of communication
- Line management of several principal gift fundraisers in the Development Office (as listed above), including setting of goals and objectives in close liaison with their direct report fundraisers and assessing performance in accordance with University policy in consultation with the Chief Development Officer
- In liaison with the Chief Development Officer and the other Directors of Development, helping ensure that all the fundraisers are able to meet their activity and financial targets. This includes working closely with the fundraisers to assist them, and ensuring that the teams operate to the highest professional standards
- Ensuring the Vice-Chancellor has strong support for major gift activity – working with the Chief Development Officer to share responsibility for staffing VC donor meetings and travelling with her internationally, so that one or the other is always in the UK to provide major gifts strategic and management support. The post holder will also support the Chief Development Officer in the management of her principal gift relationships
- Working with the UODO Senior Leadership Team to ensure fundraisers have all the relevant information and resources they require for successful relationship building and maximise training opportunities as appropriate
- Line management of a Personal Assistant and Project Officer



Building a portfolio of prospects

- Working with the Chief Development Officer, UODO Senior Leadership Team, and direct line reports to develop and implement:
 - a pipeline of donors capable of making principal gifts, the largest gifts to Oxford
 - cultivation of strategies and fundraising plans for major prospects, including prospect allocation and coordination
 - prospect lists and gift tables for current fundraising priorities and for the planned new campaign
- The Director of Principal Gifts will also develop and actively manage their own portfolio of principal gift donors and prospects, working closely with the Chief Development Officer and Executive Director of Development

Developing key working relationships

- Working with direct reports and the UODO Senior Leadership Team, ensuring that there is good communication and teamwork between the Development Office and the academic divisions, departments and major institutions of the University, as well as Oxford's colleges and permanent private halls
- Awareness of college interests in fundraising and working to uphold the fundraising Relationship Management Protocols for the University and the colleges. This will involve developing and maintaining excellent collaborative relationships with the Directors of Development of the colleges of the University, and other major gift fundraisers within the University, and liaising with them to ensure that any contact with prospective donors is well co-ordinated and followed through in an efficient and consistent manner

The post holder will carry out any other duties which are requested by the line manager and are commensurate with the grade of this post.



The Candidate

Key Criteria for Success

After 12 months in the role the successful candidate will be expected to have:

- Become an effective member of the UODO Senior Leadership Team, providing support for, and working closely with, the Chief Development Officer
- Developed clear plans and targets for fundraisers and support staff in the principal gifts team
- Developed a robust portfolio of potential donors and volunteers that they will manage personally, and with whom they have established strong relationships
- Cultivated strong leads for at least 3 principal gift prospects (£10m+), with solicitations in train
- Become a fully integrated leader and member of the UODO-wide fundraising team providing support and advice to the team members and with activity targets and prospect pipelines in place
- Provided effective support to the Vice-Chancellor, Pro-Vice-Chancellors and Chief Development Officer

Selection criteria

Essential selection criteria

- An excellent general level of education, including a degree or equivalent
- Significant major gifts fundraising experience, including proven success in personally securing seven figure gifts in the UK and/or internationally
- Experience gained in a successful and substantial fundraising campaign
- Proven management experience in a complex organisation
- Evidence of being able to lead and motivate others also involved in fundraising
- A very high level of literary and communication skills, both oral and written
- An interest in higher education

Experience and knowledge

- Excellent social skills and cultural understanding

Skills and abilities

- Strong leadership skills, a collaborative management style, and experience of successfully managing staff in a proactive and positive manner
- Excellent communication skills, both oral and written
- Proven ability to develop good working relationships with the academic community and to work closely with academics, university leaders, and administrators
- A proven ability to work well under pressure in a complex and demanding environment
- The capacity to apply innovative and practical problem-solving skills to the challenges at hand



- The ability to represent the University of Oxford among a range of external constituencies
- The ability to think strategically
- The ability to be highly opportunistic and to take initiatives on his/her own when the situation demands it

Attitudes

- Be in possession of the personal sensitivity, creativity and tact that is needed when working with senior academics, development colleagues and prospective major donors to the University
- Tenacity, drive and imagination
- Willingness to work out of regular hours and to travel
- A high level of self-motivation

Desirable selection criteria

- Experience of securing 8-figure (£10m+) gifts
- Proficiency in one or more foreign languages



Pre-employment screening

Standard checks

If you are offered the post, the offer will be subject to standard pre-employment checks. You will be asked to provide: proof of your right-to-work in the UK; proof of your identity; and (if we haven't done so already) we will contact the referees you have nominated. You will also be asked to complete a health declaration so that you can tell us about any health conditions or disabilities for which you may need us to make appropriate adjustments.

Please read the candidate notes on the University's pre-employment screening procedures at: <https://www.jobs.ox.ac.uk/pre-employment-checks>

Hazard-specific / Safety-critical duties

This job includes hazards or safety-critical activities. If you are offered the post, you will be asked to complete a health questionnaire which will be assessed by our Occupational Health Service, and the offer of employment will be subject a successful outcome of this assessment.

The hazards or safety-critical duties involved are as follows:

- Lone Working
- Occasional travel outside of Europe or North America on University Business

Additional Details

Benefits of working at the University

Employee benefits

University employees enjoy 38 days' paid holiday, generous pension schemes, travel discounts, and a variety of professional development opportunities. Our range of other employee benefits and discounts also includes free entry to the Botanic Gardens and University colleges, and discounts at University museums. See <https://hr.admin.ox.ac.uk/staff-benefits>

University Club and sports facilities

Membership of the University Club is free for all University staff. The University Club offers social, sporting, and hospitality facilities. Staff can also use the University Sports Centre on Iffley Road at discounted rates, including a fitness centre, powerlifting room, and swimming pool. See www.club.ox.ac.uk and <https://www.sport.ox.ac.uk/>.

Information for staff new to Oxford

If you are relocating to Oxfordshire from overseas or elsewhere in the UK, the University's Welcome Service website includes practical information about settling in the area, including advice on relocation, accommodation, and local schools. See <https://welcome.ox.ac.uk/>

There is also a visa loan scheme to cover the costs of UK visa applications for staff and their dependents. See <https://staffimmigration.admin.ox.ac.uk/visa-loan-scheme>



Family-friendly benefits

With one of the most generous family leave schemes in the Higher Education sector, and a range of flexible working options, Oxford aims to be a family-friendly employer. We also subscribe to the Work+Family Space, a service that provides practical advice and support for employees who have caring responsibilities. The service offers a free telephone advice line, and the ability to book emergency back-up care for children, adult dependents and elderly relatives. See

<https://hr.admin.ox.ac.uk/my-family-care>

The University has excellent childcare services, including five University nurseries as well as University-supported places at many other private nurseries.

For full details, including how to apply and the costs, see <https://childcare.admin.ox.ac.uk/>

Disabled staff

We are committed to supporting members of staff with disabilities or long-term health conditions.

For further details, including information about how to make contact, in confidence, with the University's Staff Disability Advisor, see <https://edu.admin.ox.ac.uk/disability-support>

Staff networks

The University has a number of staff networks including the Oxford Research Staff Society, BME staff network, LGBT+ staff network and a disabled staff network. You can find more information at

<https://edu.admin.ox.ac.uk/networks>

The University of Oxford Newcomers' Club

The University of Oxford Newcomers' Club is an organisation run by volunteers that aims to assist the partners of new staff settle into Oxford and provides them with an opportunity to meet people and make connections in the local area. See www.newcomers.ox.ac.uk.

Information for priority candidates

A priority candidate is a University employee who is seeking redeployment because they have been advised that they are at risk of redundancy, or on grounds of ill-health/disability. Priority candidates are issued with a redeployment letter by their employing department(s).

If you are a priority candidate, please ensure that you attach your redeployment letter to your application (or email it to the contact address on the advert if the application form used for the vacancy does not allow attachments).

If you need help

Help and support is available from: <https://hrsystems.admin.ox.ac.uk/recruitment-support>

If you require any further assistance please email recruitment.support@admin.ox.ac.uk.

To return to the online application at any stage, please go to: www.recruit.ox.ac.uk.

Please note that you will receive an automated email from our e-recruitment system to confirm receipt of your application. **Please check your spam/junk mail** if you do not receive this email.



How to Apply

The preferred method of application is online at www.berwickpartners.co.uk/90013

If you are unable to apply online please email your application to response.manager@berwickpartners.co.uk

All applications will receive an automated response.

All candidates are also requested to complete an online Equal Opportunities Monitoring Form which will be found at the end of the application process.

For **detailed information** on how we process your personal data, please review our privacy policy on our website <https://www.berwickpartners.co.uk/privacy-policy/>.

In line with GDPR, we ask that you **do NOT send us** any information that can identify children or any of your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, data concerning health or sex life and sexual orientation, genetic and/or biometric data) in your CV and application documentation. Following this notice, any inclusion of your Sensitive Personal Data in your CV/application documentation will be understood by us as your express consent to process this information going forward. Please also remember to not mention anyone's information or details (e.g. referees) who have not previously agreed to their inclusion.

If you have any queries or would like more information in regard to this document, please contact:

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