



Candidate brief for the position of
ASSOCIATE DIRECTOR OF DEVELOPMENT - PRINCIPAL GIFTS
University of Oxford

10/04/2024



Berwick Partners
an Odgers Berndtson company

Company Overview

About 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.

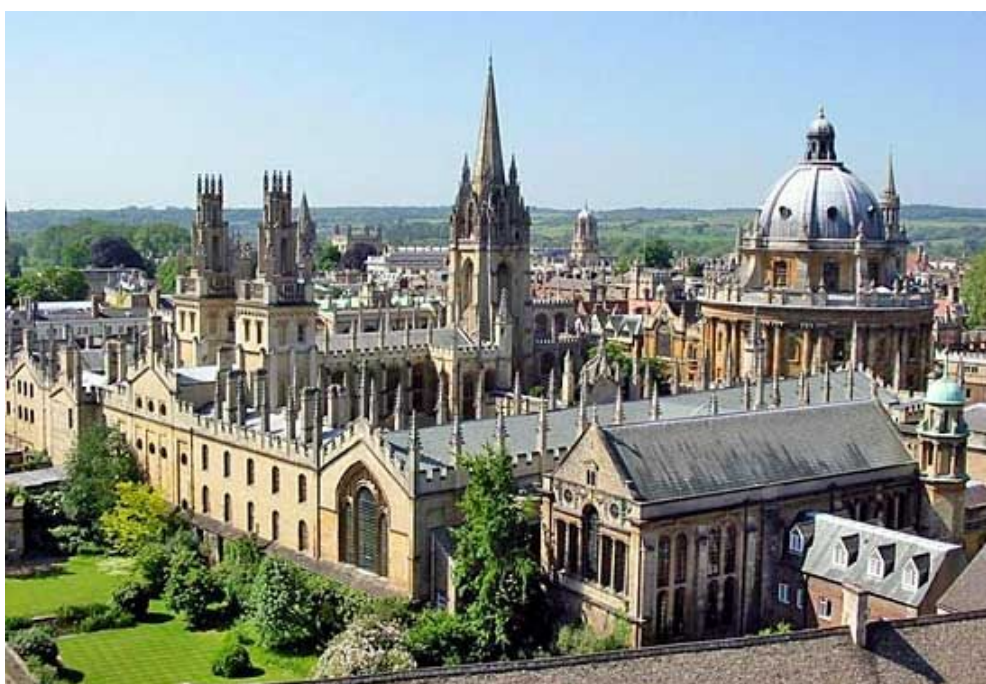
We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, while providing all our staff with a welcoming and inclusive workplace that enables everyone to develop and do their best work. Recognising that diversity is our strength, vital 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 spinouts, 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#/>.



Background to the Role

Development and Alumni Engagement (DAE)

DAE is led by Liesl Elder who, as Chief Development and Alumni Engagement Officer at the University of Oxford, reports directly to the Vice-Chancellor. DAE's mission is to help secure philanthropic support for the University, and build an engaged, informed, and active alumni community. Through working in partnership with academic, development, and alumni colleagues throughout the collegiate University, DAE builds enduring relationships with external constituencies – including alumni, non-alumni, corporate and foundation donors – and increases financial support for agreed academic priorities.

The office is one of the central administrative departments of the University, collectively known as University Administration and Services. Due to the nature of its work, DAE collaborates closely with a number of other units and teams, particularly Public Affairs, Finance, Research and Legal.

In 2019, the University and the colleges completed the Oxford Thinking Campaign, which raised £3.34bn, and is the most successful higher education fundraising campaign in Europe. The University is currently planning its next major campaign and, as a member of DAE, the post holder will have a key role to play in helping realise its successful delivery.

In addition to front-line fundraising and alumni engagement staff, DAE has a number of teams that cover particular support functions. These include:

- Donor Relations
- Events
- Research
- International Engagement
- Development and Alumni Relations Systems (DARS) (which supports the Development and Alumni Relations database)
- Communications
- Marketing and Insights

It also works closely with Gift Registry, part of the Finance Division, which records and processes donations received by the University and on behalf of colleges. In addition, there are four overseas offices whose remit includes development and alumni engagement; these offices are located in North America, Japan, Hong Kong, and Switzerland.

For further information please visit: [Development Office \(ox.ac.uk\)](https://development.ox.ac.uk) and [HOME | Oxford Alumni](https://home.ox.ac.uk)

DAE is committed to equality and values diversity. The University holds a silver Athena Swan award to recognise advancement of gender equality: representation, progression, and success for all.



The Role

Job Title	Associate Director of Development – Principal Gifts
Division	University Administration and Services
Department	Development and Alumni Engagement (DAE)
Location	University Offices, Wellington Square, Oxford OX1 2JD - but you may be able to agree a pattern of regular remote working with your line manager.
Grade and Salary	Competitive salary and benefits
Hours	Full time (37.5 hours per week)
Contract Type	Permanent
Reporting To	Director of Development – Principal Gifts
Additional Information	<p>Applications are welcome and encouraged from all sectors of the community and we are especially keen to encourage candidates from under-represented groups to apply. Development and Alumni Engagement is committed to equality and values diversity.</p> <p>Subject to HMRC regulations and the availability of funding, a relocation allowance may be available.</p>



The University of Oxford is founded on the quality of its teaching, scholarship, and service to society. It is working harder and faster than ever to create new knowledge and find answers to global problems, helping to make a more equitable society and educate the next generation of leaders.

Philanthropy plays a critical role in enabling Oxford to maintain and build on its status as a world-class centre of learning. Major and principal gifts have played a significant part in Oxford's success with the Oxford Thinking Campaign and these gifts have made a number of important projects possible. Recent significant gift donations have brought the following projects to fruition:

The Stephen A. Schwarzman Centre for the Humanities will be the new home for humanities at Oxford, providing state-of-the-art facilities for seven faculties, the Institute for Ethics in AI, and the Oxford Internet Institute. It will house a new humanities library, as well as public-facing exhibition and performance spaces.

The Ineos Oxford Institute for AMR Research is a new cutting-edge institute to combat the growing global threat of antimicrobial resistance (AMR) in both humans and animals.

Reuben College is Oxford's newest college, bringing graduate students and academics from traditionally different disciplines together to work on global challenges including artificial intelligence and machine learning; environmental change; ethics and values; and cellular life.

The Poonawalla Vaccines Research Building will house over 300 research scientists providing the focus and scale for the University's major vaccine development programmes, allowing a rapid expansion of this fast-growing, translational area.

The Moh Family Foundation is supporting the work of Oxford University's Pandemic Sciences Institute, greatly strengthening its ability to identify and counter future pandemic threats and ensure equitable access to treatments and vaccines around the world.

The Bennett Institute for Applied Data Science has been established to pioneer the better use of data, evidence, and digital tools in healthcare and policy, optimising the impact of interventions to achieve improved outcomes.

The Dieter Schwarz Foundation is supporting an ambitious programme of research dedicated to investigating the impact of AI and other game-changing technologies. They have also provided a major boost to the study and teaching of German at Oxford, principally through the endowment of the Schwarz-Taylor Chair in the German Language and Literature.

The University of Oxford has been successful in raising donations from a broad, international range of donors, including alumni, non-alumni, foundations and trusts, and corporations.



Key relationships:

The Vice-Chancellor, PVCs, Chief Development and Alumni Engagement Officer and DAE's Senior Leadership Team. Significant collaboration with Heads of Division, Heads of Department and the Heads of Development and their teams. Events and Publications, College development staff, other senior academics, and administrative staff.

Purpose:

To identify, cultivate and solicit principal and major gift donations (primarily 8 figure transformational gifts) in support of the University and as part of our next fundraising campaign. The role will focus on securing gifts for strategic priority areas of the University and the pipeline will be a mix of ultra-high-net-worth individuals, foundations, and corporations across the globe.

The post-holder will be supported by a Project Officer and will be able to use the other UODO support services provided (including accounting, database, proposal writing and research).

The line manager will regularly review progress. There may be opportunities for career development within the University structure. DAE seeks to support and encourage staff to help them reach their potential, providing access to appropriate courses and training whenever possible, as well as a comprehensive induction process.

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 versatile and adaptable, and able to contribute to the development of the fundraising function of the collegiate University.

DAE's work 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 their 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.



Development and Alumni Engagement values

The following points lay down the foundations of the working ethos, culture, and values of DAE. 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

Reporting to the Director of Development – Principal Gifts and working closely with the Chief Development and Alumni Engagement Officer, and the Vice-Chancellor of the University, the post-holder will manage the cultivation and solicitation of a portfolio of the University's most generous donors and prospects. The post-holder will be responsible for building a robust pipeline of opportunities to support our campaign objectives. This will involve prospect identification, research, and the development of personalised cultivation strategies. Securing gifts at the 8-figure level will require close collaboration with senior University officers, and with colleagues across the collegiate University as well as with a wide range of internal and external stakeholders.

Fundraising Responsibilities

- To research and identify prospects with whom the University will aim to develop significant philanthropic relationships. These will be drawn from several groups: ultra-high net-worth individuals (both alumni and non-alumni), the corporate sector, trusts, and foundations.
- To develop cultivation and solicitation strategies for these donors and prospects in support of the University's strategic priorities. These will include capital, research, and scholarship priorities and will involve building and managing a network of relationships with these prospects.
- To secure meetings with major prospects and donors and involve the Chief Development and Alumni Engagement Officer, the Vice-Chancellor, and senior academics as appropriate. This will involve international travel.
- To identify areas of possible support for our strategic priorities for each individual donor and prospect and work with senior stakeholders to solicit major gifts. To play an integral role in negotiating and bringing these gifts to fruition, including the complexities of negotiating gift agreements.
- To be Relationship Lead for these donors and prospects, ensuring coordination across the University and colleges. As part of this it will be key to understand their giving to Oxford as a whole (if they support multiple strands) and to ensure a proactive approach is taken in managing the relationship and communications.
- To develop bespoke funding proposals for these major gift solicitations with support from the proposals team.
- To evaluate various gift opportunities and giving vehicles and recommend the most suitable for a particular donor.
- To be responsible for formulating and implementing stewardship strategies for all donors for whom the post-holder is the primary relationship manager.
- To travel as required with the Vice-Chancellor or Chief Development and Alumni Engagement Officer and with selected other University officers, academics, and/or senior volunteers, commensurate with Oxford's standard expectations for fundraising activity, contact and travel.
- To interact with internal contacts such as Pro-Vice-Chancellors, Heads of Division, and other Development staff to consult on University needs, to formulate strategies to promote prospect engagement with the University, and to identify potential high-level donors.
- To assist with the strategy for and creation of written communications from the Vice-Chancellor, Chief Development and Alumni Engagement Officer, and other senior administrators appropriate to a donor's interest.
- To optimise philanthropic support for the collegiate University and to adhere to best practice in prospect cultivation, solicitation, and stewardship.
- To ensure that a current and accurate record of all development strategy and activity for which the post-holder is responsible be maintained on the collegiate University's database.



- Alongside the other development professionals within the collegiate University, to have a University-wide responsibility to develop fundraising relations for the University as a whole.

Strategic and Leadership Responsibilities

- To identify, develop and execute optimal fundraising strategies and structures to the benefit of the collegiate University.
- To understand and assess fundraising potential for key strategic priorities within the University and advise the Director of Development – Principal Gifts, the Chief Development and Alumni Engagement Officer, and other senior officers on deliverable levels of philanthropic support for these priorities.
- To be familiar with, and help facilitate, the delivery of the University of Oxford's strategic vision and plan, specifically in terms of securing funding for key strategic development priorities. To be able to navigate the internal complexities of Oxford using judgement and influence with stakeholders as gift discussions and negotiations progress.
- To assess and offer, as appropriate, development training to senior officers and academics to help them to participate as fully as possible in a successful development programme.

Communication and External Responsibilities

- To understand complex academic projects and articulate them in ways both likely to be understood by prospective donors and result in optimal philanthropic support, marketing the institution and its philanthropic goals at the highest levels.
- To identify, recruit and work with high-level volunteers who can assist with prospect identification and solicitation; to recruit, develop, and lead internal working groups and external networks, including international volunteer groups at the highest level; to be responsible for setting their goals and vision.
- To ensure the Director of Development – Principal Gifts and the Chief Development and Alumni Engagement Officer are regularly updated on major donor/prospect discussions.
- To report and present to senior officers, academics, and committees across the collegiate University.
- To carry out such other functions as from time to time the Director of Development – Principal Gifts might require commensurate with the level of this position.

The Candidate

Essential selection criteria

Experience and knowledge

- Significant major gifts fundraising experience, including proven success in personally securing seven figure gifts in the UK and/or internationally.
- Experience of identifying suitable donors and prospects and devising sophisticated cultivation and solicitation strategies and managing a portfolio of major gifts prospects with proven success.
- Experience of negotiating detailed gift agreements working with key internal stakeholders and the donor to ensure a successful outcome.
- Experience gained in a successful and substantial fundraising campaign.
- An interest in higher education.
- Experience of an institution which is both international and complex, and of the highest reputation.
- Proven ability to develop good working relationships with the academic community and to work closely with academics, university leaders, and administrators.
- Proven ability to work well under pressure in a complex and demanding environment and make sound judgments.
- Highly credible and thereby quickly gaining support of the donors and prospects as well as the various internal stakeholders.
- Capacity to apply innovative and practical problem-solving skills to the challenges at hand.
- Evidence of excellent communication skills and collaboration.

Skills and abilities

- Superior written and oral communication, negotiating, organisational, analytical and fundraising skills, including the ability to interpret financial information and manage data.
- The capability to represent the University at the highest levels both internally and externally.
- The ability to work independently and collegially with a wide range of people, internal and external to the University.
- An ability to 'think on your feet' to change planned proposals to meet donors' needs in situations where it may not be possible to refer, or seek guidance from, the Director of Development.
- An ability to think strategically.



Attitudes

- Proven ability to develop good working relationships with the academic community and to work closely with academics, university leaders, and administrators.
- Proven ability to work well under pressure in a complex and demanding environment and make sound judgments.
- Highly credible and thereby quickly gaining support of the donors and prospects as well as the various internal stakeholders.
- Capacity to apply innovative and practical problem-solving skills to the challenges at hand.
- Evidence of excellent communication skills and collaboration.

Desirable selection criteria

- A good general level of education, including a degree or equivalent.
- Experience of working internationally.
- An understanding of the University of Oxford and its goals in teaching and research.



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
- Travel outside of Europe or North America on University Business

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).

Important information for candidates

Data Privacy

Please note that any personal data submitted to the University as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation. For further information, please see the University's Privacy Notice for Job Applicants at:

<https://compliance.admin.ox.ac.uk/job-applicant-privacy-policy>. The University's Policy on Data Protection is available at: <https://compliance.admin.ox.ac.uk/data-protection-policy>.

The University's policy on retirement

The University operates an Employer Justified Retirement Age (EJRA) for very senior research posts at **grade RSIV/D35 and clinical equivalents E62 and E82**, which will be 30 September before the 70th birthday. The justification for this is explained at: <https://hr.admin.ox.ac.uk/the-ejra>.



For **existing** employees on these grades, any employment beyond the retirement age is subject to approval through the procedures: <https://hr.admin.ox.ac.uk/the-ejra>.

There is no normal or fixed age at which staff in posts at other grades have to retire. Staff at these grades may elect to retire in accordance with the rules of the applicable pension scheme, as may be amended from time to time.

Equality of opportunity

Entry into employment with the University and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each particular post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.

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.

Oxford Research Staff Society (OxRSS)

A society run by and for Oxford University research staff. It offers researchers a range of social and professional networking opportunities. Membership is free, and all researchers employed by Oxford University are welcome to join. Subscribe at researchstaff-subscribe@maillist.ox.ac.uk to join the mailing list to find out about upcoming events and other information for researchers, or contact the committee on committee@oxrss.ox.ac.uk. For more information, see www.ox.ac.uk/oxrss, Twitter @ResStaffOxford, and Facebook www.facebook.com/oxrss.

How to Apply

The preferred method of application is online at www.berwickpartners.co.uk/91349

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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Recruitment Schedule

Closing Date for Applications	Friday 10 th May 2024
Preliminary Interviews with Berwick Partners	Monday 20 th & Tuesday 21 st May 2024
Initial Client Interviews	w/c 27 th May 2024
Final Client Interviews	w/c 3 rd June 2024





Berwick Partners
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