

UW HEALTH JOB DESCRIPTION

Foundation Medical Principal Gifts Liaison

Job Code: 300139	FLSA Status: Exempt	Mgt. Approval: J. Robaidek	Date: October 2020
Department: UW Health Development		HR Approval: J. Theisen	Date: October 2020

JOB SUMMARY

The Foundation Medical Principal Gifts Liaison will work, report to, and take strategic direction from the Wisconsin Foundation and Alumni Association (WFAA) Vice President of Development – Medical Principal Gifts. The Development Program Manager – Medical Principal Gifts will play a key role in managing the principal gift donor engagement strategies with SMPH, UW Health, and WFAA leadership, identifying high level cultivation and stewardship efforts for medical principal gift donors, and providing important administrative support for the program.

MAJOR RESPONSIBILITIES

- Work in active partnership with the Vice President of Development – Medical Principal Gifts to plan, implement, manage and evaluate strategies, initiatives, and projects designed to enhance and advance medical principal gift donor identification, cultivation, solicitation, and stewardship and successfully move projects and relationships to completion.
- Work directly with the Medical Advancement Group Stewardship Team and the WFAA Stewardship Team on comprehensive stewardship plans; develop and coordinate implementation of high touch stewardship/engagement activities for medical principal gift donors.
- Work directly with the Vice President of Development – Medical Principal Gifts on the preparation, management, execution, and follow up of all Campaign Planning Committee meetings.
- Play a lead role in working directly with the Dean of SMPH, CEO of UW Health, and other medical leaders on communicating their role and engagement strategy with medical principal gift donors.
- Working directly with the Vice President of Development – Medical Principal Gifts on the preparation, coordination, communication, and execution of the Campaign Planning Committee including pre and post outreach to committee members.
- Manage a portfolio of high-level community leaders to enhance their engagement with the Medical Advancement Group and to work with them on identifying potential major and principal gift level prospects.
- Communicate directly with medical principal gift prospects and donors to provide additional touchpoints to enhance the engagement process.
- Serve as primary Medical Principal Gift program liaison to all parties to respond to all inquiries, requests, and issues related to medical principal gift donors.
- Work directly with the appropriate events manager for all medical principal gift events to ensure appropriate management and execution of medical principal gift attendance, engagement, and follow up.
- Coordinate internal principal gift strategies with the appropriate Medical Advancement Group and WFAA development officers.
- Work directly with the Associate VP of Principal Gifts and the Development Program Manager for Principal Gifts at WFAA to ensure coordination between the WFAA Principal Gift program and the Medical Principal Gift Program.
- Strategically manage coordination with the Chancellor's office regarding scheduling of high impact donors and creation of donor biographical information for the WI Club, UW Health suites, VIP donor meetings, corporate events, etc.
- Prepare all medical principal gift donor bios and other pertinent materials for internal and SMPH/UW Health meetings.
- Coordination and management of Medical Principal Gift donor database.
- Work in partnership with research and prospect management to provide logistical support on principal gifts rated project/prospects.
- Expertise with multi-tasking, working independently, intentional decision making and demonstrated ability to manage highly engaged constituents.
- Perform required office management and multiple participant meeting scheduling for the Medical Principal Gift program.
- Expert writing skills with a commitment to accuracy and attention to detail.
- Agenda creation, constituent data management, action item follow-up, reports creation, and more for the Medical Principal Gift program.

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Support a service-oriented atmosphere in accordance with WFAA mission, values and philosophy

- Strategic beliefs
- The University of Wisconsin-Madison has a transforming impact on students, alumni, and society;
- Authentic, lifelong relationships and engagement with alumni, donors and friends are fundamental to sustaining the reputation and continued success of the University;
- Philanthropy has an essential and growing importance on the future progress of UW-Madison;
- The highest level of stewardship and fiduciary responsibility in financial, investment, data and gift administration is vital to maintaining trust with our stakeholders;
- Diverse views, experiences and perspectives strengthen WFAA and the university community.
- Organizational values
- We are serious about delivering results;
- We work together and with our campus partners as a team;
- We are committed to alumni, donors, volunteers and others;
- We are open-minded;
- We create a positive work environment.

ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.

JOB REQUIREMENTS

Education	Minimum	Bachelor's Degree in relevant field
	Preferred	
Work Experience	Minimum	Five (5) years of relevant professional work experience, non-profit, higher education, or fund-raising environments preferred
	Preferred	
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Excellent verbal and written communication skills and strong attention to detail. • High degree of proficiency in Microsoft office (Word, Excel, Outlook, and PowerPoint); previous experience with database reporting preferred.

AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

Instructions: Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,

<input type="checkbox"/>	Infants (Birth – 11 months)	<input type="checkbox"/>	Adolescent (13 – 19 years)
<input type="checkbox"/>	Toddlers (1 – 3 years)	<input type="checkbox"/>	Young Adult (20 – 40 years)
<input type="checkbox"/>	Preschool (4 – 5 years)	<input type="checkbox"/>	Middle Adult (41 – 65 years)
<input type="checkbox"/>	School Age (6 – 12 years)	<input type="checkbox"/>	Older Adult (Over 65 years)

JOB FUNCTIONS

Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.

PHYSICAL REQUIREMENTS

Indicate the appropriate physical requirements of this job in the course of a shift. *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

Physical Demand Level		Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
X	Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	Up to 10#	Negligible	Negligible

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	Light: Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree.	Up to 20#	Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	Negligible or constant push/pull of items of negligible weight
	Medium: Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	20-50#	10-25#	Negligible-10#
	Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	50-100#	25-50#	10-20#
	Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	Over 100#	Over 50#	Over 20#
Other - list any other physical requirements or bona fide occupational qualifications not indicated above:				

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.