

UC Berkeley Staff Fellowship Program



Staff Fellowship Program

Supporting career mobility within the campus community

Berkeley People & Culture

Qualification / Discovery Fellowship with the UDAR Major Gifts Program

Department Overview

University Development and Alumni Relations (UDAR), increases support for and enhances knowledge of UC Berkeley through communications, public outreach, and fundraising. UDAR is responsible for fundraising and donor engagement, and works to strengthen unit development offices by consulting and partnering with campus fundraisers. UDAR also handles a range of central activities and services encompassing events, communications, stewardship, prospect development, gift management, database management, and more.

The Major Gifts team within UDAR works to secure philanthropic support among University alumni, parents, and friends across a range of geographical regions with a focus on gifts in the \$100,000 - \$5 million range. Geographically, the regional areas of focus of the team are the greater Bay Area/Northern California region, the greater East Coast region (New York, Boston, & Washington, D.C.), and Southern California (Santa Barbara to San Diego).

Position Overview

The Qualification / Discovery Fellowship is a three to six month project which aims to provide a UC Berkeley staff member with supported qualification and discovery experience. The position will also provide the Major Gifts Senior Director with data on the efficiency and effectiveness of a qualification and discovery staff specialist. In this role you will learn how and when to reach out to prospective major gift donors. Time permitting, you may have the opportunity to participate in team meetings and work with experienced major gift staff while learning more about what it is like to work on a major gifts fundraising team.

Time Commitment: The fellow commits to a minimum of two (2) hours a week and a maximum of four (4) hours a week to this project. The fellow and regional Senior Director meet weekly to discuss strategy and next steps and address any questions or concerns. The Senior Director is available for questions/check-ins as needed. The fellow will devote one to two (1-2) hours per week to prospect qualification outreach efforts and follow-up with prospects if timely. During the week, the fellow will respond to prospects as needed and keep track of their hours in fifteen-minute increments (aka "billable hours model").

Scope: There are currently three fellowships available, one for each of the regions that the Major Gifts Team covers: Bay Area, East Coast and Southern California.

The list of prospects is provided by the Prospect Development Analyst and consists of ten (10) rated prospects located in the designated geographic region. The majority are rated with a \$100-\$250K capacity, and most have some prior giving. With an industry standard of a 10% response rate from prospects, new prospects are added depending on progress and response from prospects for meetings. The list may shrink to as few as five (5) prospects or grow to fifteen (15) prospects at any given time and with agreement from all parties. The Prospect Development Analyst is kept abreast of the progress and offers additional prospects as needed with at least one week's advance notice.

The fellow reaches out a minimum of three times through three channels/vehicles (i.e., phone call, email, LinkedIn) and ideally up to five times (i.e., follow-up phone call and email) to secure a response. The fellow documents the touches and next steps in a shareable format (such as Smartsheet or Google Sheets) and updates CADS/CADScrm with contact reports weekly.

The fellow sets up meetings (in-person, phone calls, or zoom) with interested prospects and designated major gift officers (MGOs). The MGO leads prospect meetings, and the fellow attends as appropriate given the prospect and when their schedule allows.

Resources and Training: The fellow will receive support and resources (template language, sample emails, etc.) from the Senior Director and the regional team members before commencing the project and as needed throughout. The fellow will also be granted access to the LinkedIn Sales Navigator tool for the project's duration. The fellow will utilize skills and tools from various trainings, to include: [the Art and Skill of Major Gift Fundraising](#), [Prospect Qualification & Strategy for MGOs](#), and further training as available and applicable.

Assessment and Feedback: The fellow and the Senior Director meet weekly to discuss the work and progress and share a brief progress report with their respective supervisors. At the end of the program the fellow and Senior Director will meet and prepare a project summary with metrics, key takeaways, challenges, and opportunities and share it with their supervisors/leadership.

Staff Fellowship Inquiry

If you are interested in learning more about this Staff Qualification / Discovery Fellowship Opportunity with the Major Gifts team please email the following information to tcardenas@berkeley.edu and gilliansmith@berkeley.edu by July 21, 2023.

- Name
- Email address
- Phone number
- Working Title
- Job Classification
- Please indicate which regional team you prefer to work with. If you have no preference, please indicate that you have no preference
 - Bay Area Team
 - East Coast Team
 - Southern California Team