

## Job Description

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<b>Job Title:</b>	Director of Advancement
<b>Department:</b>	Dean of Mathematics
<b>Reports To:</b>	Dean of Mathematics
<b>Jobs Reporting:</b>	4902, 5464, 4474 (Senior) Development Officer, 5256 Advancement Coordinator, 4111 (Senior) Advancement Officer, 4667 Associate Director
<b>Salary Grade:</b>	USG 15
<b>Effective Date:</b>	September 1, 2017

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### **Primary Purpose**

Accountable directly to the Dean of the Faculty of Mathematics, the Director is responsible for all Faculty Development and Alumni Affairs activities within the Faculty of Mathematics including all departments, the Cheriton School of Computer Science, the Centre for Education in Mathematics and Computing, and all other constituent parts. The Director works within the framework of Waterloo's Office of Advancement, and the office of the Vice-President Advancement, to ensure that Waterloo has a coordinated overall strategic advancement plan. The Director is also responsible for overseeing Faculty contributions to and compliance with Waterloo initiatives.

The Director's overall objective is to enhance the fundraising capability and success of the Faculty through the strategic planning, development and implementation of programs to provide ongoing endowments and gifts to the Faculty. To this end, the Director is accountable for strategic planning of the Faculty's Development and Alumni Activities, including the annual fundraising plan, providing Team Leadership to the Math Alumni/Development team, overseeing major gifts fundraising activity, managing a personal portfolio of major and principle gift prospects and donors, and the overall Donor and Alumni Relations strategy development. The Director is also responsible for developing and maintaining Faculty, Staff and Student Relations related to Advancement

### **Key Accountabilities**

#### **Strategic Planning**

- Establishes and implements coordinated short and long range goals and objectives for Development and Alumni activities.
- Establishes internal policies and operating procedures necessary to achieve objectives
- Monitors and evaluates the development program effectiveness against priorities and performance targets; effects changes required for improvement.
- Provides input to capital and other university-wide fundraising campaigns and project themes.
- Ensures Faculty Development programs are in-line with overall university goals and objectives
- Develops and implements fundraising strategies for faculty funding priorities in consultation with team members and counsel, for example for increasing the average gift, for renewing and upgrading donors and for building the major gifts pipeline.
- Initiates and directs research on individuals identified as having significant donor potential.
- Accountable for the assigned operating budget.

#### **Team Leadership**

- Provides leadership, priority setting and management direction to staff
- Directs recruiting, training, and evaluation of program staff.

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- Assesses and develops staff potential through assignment of responsibilities and formal training opportunities.
- Directs priorities and sets individual and team objectives for program staff.

### **Fundraising and Donor Relations**

- Works collaboratively with the central advancement office team to transition engagement relationships through to leadership and major gift prospects
- Initiates relationships with potentially generous donors, develops and cultivates commitment and works towards its translation into financial and volunteer support.
- Promotes the needs of the Faculty at fundraising and other special events through public speaking engagements and personal contact.
- Plans and hosts campus visits for major donors and potential major donors.
- Establishes and monitors donor recognition and acknowledgement programs.
- Develops Terms of Reference for endowment and trust donations
- Assumes primary responsibility for a significant portfolio of major gift prospects and donors. Develops and implements tailored action plans, solicitation strategies and proposals for each prospect. Make face-to-face calls both with and without key volunteers and University faculty. Prepare notes for prospect tracking and clearance system.
- Works with the Dean, the Director of the Cheriton School of Computer Science, Department Chairs and other team members assigned to solicit, support and manage volunteer involvement with Advancement activities.
- Builds/reinforces base & pipeline for major and principal gifts prospects and donors – collaboratively with central office colleagues in multi-track & PG prospects (clearance, strategy, stewardship)

### **Alumni Relations**

- Coordinates and monitors the strategic alumni plan and integrates the Alumni events and strategies into the overall Advancement plan.
- Provide Team Leadership to the Math Alumni/Development team.
- Participates in strategy development and promotion of campus-wide alumni outreach

### **Faculty Relations**

- Develops the infrastructure and linkage to Departments, Schools, and Research Institutes for fundraising strategies in all Faculty of Mathematics units.
- Works with Chairs and Directors and their faculty members in advancing individual, corporate and foundation donors in support of their funding priorities.
- Advises Chairs/Directors of established Advancement plans and policies with an aim toward providing consultation for developing appropriate effective programs at the departmental level.
- Plans and develops strategies and advises on pilot projects for Chairs/Directors to test the effectiveness of new strategies and techniques, recommends new programs

## **Required Qualifications**

*If hiring today, what would be the required education, experience, knowledge, skills and abilities?*

### **Education**

- Undergraduate University degree required, Master's degree an asset, preferably from the University of Waterloo
- Certified Fund Raising Executive (CFRE) certification

### **Experience**

- 10 years of progressively responsible fundraising experience with a proven track record of success, including volunteer management, demonstrated major gift solicitations and campaign experience

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with a proven track record of achievement and success with raising funds at a level in the top 5% for their sector, with a minimum of \$1M annually for the team they have led, or \$250K individually

- Experience producing strategic plans which consist of measureable objectives and the associated costs
- Experience monitoring and revising strategic plans
- Management experience demonstrating the ability to deal with a diversity of Human Resources related issues
- Experience with complex giving vehicles and planned giving
- Demonstrated experience using planning/project management tools to manage projects, timelines, and communications
- Experience dealing with budget-setting

### **Knowledge/Skills/Abilities**

- Proven skills leading a team of high-functioning, self-motivated professionals
- Demonstrated understanding of not-for-profit climate in North America and internationally
- Understanding of international alumni programs and fundraising
- Ability to build relationships with Faculty members, staff members, and students
- Understanding and appreciation of the key role of a university education
- History of relationship building with volunteers, prospects and organizational staff
- Creative and effective communication skills (including electronic medium)
- Proven ability to share information and to cooperate with numerous stakeholders
- Sound judgment, tact, diplomacy
- Ability to take initiative where minimal direction is provided
- Willingness to travel internationally

### **Nature and Scope**

**Contacts:** Internally, this position interacts with Faculty, Staff and Students in the Faculty of Mathematics, Senior Directors, ODA, Senior administrators (President, Provost, Vice President External Relations), Faculty Deans and the campus community, Development Officers across campus, Alumni Officers, Communications & Public Affairs, Office of Research, Co-operative Education and Career Services and Student Awards Office.

Externally this position interacts with prospects and donors for cultivation, solicitation and stewardship purposes, Executives in corporations, associations, community or government organizations, Volunteers associated with UW boards & committees, Alumni Research partners, Co-operative Education partners, External community representatives

**Level of Responsibility:** The position is responsible and accountable for the overall results of the Advancement Office. The Faculty of Mathematics Advancement team is responsible for raising \$3M-\$10M annually.

**Decision-Making Authority:** Responsible and accountable for establishing the priorities for the unit and addressing the changes to strategic business plans by consulting directly with the Dean as appropriate.

**Physical and Sensory Demands:** Minimal physical demands typical of an office environment and the demands related to significant travel.

**Working Environment:** Significant travel associated with the position, including irregular working hours