

## Job Description

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<b>Job Title:</b>	Associate Director, Major and Principal Giving
<b>Department:</b>	Development and Advancement Strategy
<b>Reports To:</b>	Director, Principal Giving
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 12/13
<b>Effective Date:</b>	August 2020

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### **Primary Purpose**

The Associate Director, Major and Principal Giving will, under the leadership of the Director Principal Giving, develop and implement a program directed towards gaining and retaining the financial support of potential donors at a giving level of \$1 million and above.

Key areas of responsibilities include university-wide pipeline development, acting as a key liaison for Faculties and non-academic units in support of major and principal gift projects, stewardship of major and principal gift donors, president's principal gift activities, supporting the development of academic ideas into principal gift fundraising priorities and managing the university's complex corporate and foundation relationships. As well, the incumbent will assist in the design and implementation of a comprehensive annual and long-range strategic plan for the Advancement Strategy team which may be annual operating or campaign oriented.

### **Key Accountabilities**

#### **Fundraising**

- Manage a prospect pool of up to 80 major and principal (\$1 million dollars + capacity) prospects; focusing on corporations, foundations and some high-net worth individuals.
- Develop and implement tailored action plans/strategies for identifying, cultivating, soliciting and stewarding prospects
- Complete 75-80 calls with top corporations/foundation prospects/donors, with 50% or more being face to face, and at least 50% with the President, Vice President Advancement or other UWaterloo senior leaders
- Responsible for generating \$5M plus in new donor commitment annually
- Initiate and manage complex donations, bequests including complex multi vehicle gifts
- Liaise with members of the university community involved in programs and projects designated as priorities for principal gift funding. Provide appropriate progress reports and involve them in the process, i.e. meetings, scheduling, etc.
- Participate in the regular principal gifts strategy meetings to discuss and plan the managing and tracking of principal gifts donor prospects and prospect clearance.
- Actively seek to identify volunteers for the principal gifts area and develop and implement recruitment strategies. Once recruited, provide support to volunteers and assist in the volunteer recognition program.
- Develop and maintain a good working knowledge of the University's activities and priority projects
- Prepare written materials including case statements and tailored proposals, progress reports, prospect correspondence and briefing notes and memos.

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- Serve as an ambassador for the university both within the university community itself and outside consistently and convincingly demonstrating the role and importance of private support.
- Liaise with senior university faculty and administrators and corporate and community leaders to encourage financial support and/or volunteer assistance.
- Establish own priorities among the numerous responsibilities and projects encompassed by the position.
- Provide instructions, training and guidance to newly hired development and administrative staff on principal gifts protocols and procedures.
- Support the President, Vice President Advancement and the AVP Development and Advancement Strategy by developing strategies, providing written materials and oral briefings, and assisting with solicitations.
- Represent UW at events, meetings and off-site presentations

### **Administration and Reporting**

- Ensure compliance with all relevant University policies, procedures and processes
- Record detailed notes for prospect tracking and clearance systems, and prepare regular progress reporting on fundraising targets through standardized reporting tools to gauge the effectiveness of activity on ongoing donor strategies

### **Communication and Internal Collaboration**

- Encourage and support close collaboration and sharing of knowledge and expertise between colleagues in Central Office (OA), the Faculties/Colleges and other UWaterloo units
- Guide and support the development and application of strategies with relevant Faculty Advancement Directors, Institute Directors and other university staff, faculty and senior administration to acquire funds in the range of \$1M plus
- Develop and leverage partnerships with Alumni Relations, Office of Research, GEDI, Co-operative Education, and other academic support units to maximize revenue generation and build broad based relationships with large corporations
- Ensure that all University leaders, faculty and staff involved in the strategy for a prospect/donor are consulted and involved in the implementation of pan-university fundraising plans
- Have editorial/proofreading responsibilities for any significant sponsorship proposals/agreements/MOU's which are to be submitted

*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

## **Required Qualifications**

### **Education**

- Completion of a Bachelor's degree
- CFRE certification and an advanced degree would be an asset

### **Experience**

- 5+years of progressive fundraising experience with a proven track record of achievement and success with raising funds at the \$1M plus level from corporations, foundations and individuals.

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

- Ability to thrive under pressure and juggle multiple timelines

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- Strong negotiation and mediation skills
- Ease in interacting with a diverse client base both internal and external to the University
- A working knowledge of the university environment is a definite asset
- Demonstrated competency in critical and strategic thinking
- Exceptional communication and interpersonal skills
- Excellent judgment and ability to nurture key relationships

### Nature and Scope

- **Contacts:** Communicates regularly with stakeholders across campus from all levels of the institution, representing the department with strong interpersonal skills to influence and motivate others, and to promote, justify and settle highly sensitive matters. Sensitivity to the diverse student and staff population on campus, often working with confidential and sensitive information requiring a mature and professional demeanor. External contacts include individuals with high net worth, senior leaders of industry, executive staff and board members, and government representatives.
- **Level of Responsibility:** The Associate Director is responsible for advising, supporting and assisting the Director, AVP Development and Advancement Strategy, the VP Advancement and the President to President, VP Advancement and Principal Gifts to ensure that the University's fundraising goals are met.
- **Decision-Making Authority:** The Associate Director works with confidential and sensitive issues relating to the donor's philanthropy. The impact of decisions of the incumbent will have significant effect on the fundraising program and the University. The Associate Director makes decisions on the call strategy and follow up activity of some of the University's top donors.
- **Physical and Sensory Demands:** Minimal physical demands typical of an office environment and the demands related to significant travel.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of an Associate Director position exposed to stress and pressure associated with senior level responsibilities. The Associate Director requires an ability to work under pressure, juggle multiple timelines, negotiate with donors, mediate among staff and faculty, interact with a diverse client base including other members of the Waterloo fundraising team, the President, faculty members, deans and senior administration and staff of other university business units.