Job Title:	Associate Director, Advancement Operations
Department:	Office of Advancement
Reports To:	Associate Vice-President, Advancement Services
Jobs Reporting:	Manager, Alumni and Donor Services Manager, Data Quality Gift Administration Officer Training Officer Customer Service and Department Assistant
Salary Grade:	USG 12
Effective Date:	July 2021

Primary Purpose

The Associate Director, Advancement Operations is accountable for providing strategic leadership for the activities and results of some of the core business units within the Office of Advancement—Gift Processing, Records Management, and Training/Human Resources. These units support and sustain university-wide and faculty-based fundraising and alumni programs.

Key Accountabilities

Strategic direction and leadership

- Leads the creation, documentation and improvement of business processes related to records management, gift processing, human resources, etc.
- Identifies and implements strategic initiatives related to operations.
- Serves as an integral member of the Advancement Services management team and leads or participates in committees or project teams.
- Develops strategic plans, multi-year operating plans (OKRs) to guide the work of the Operations team in collaboration with academic support and faculty/AFIW partners.
- Coordinates business planning for Advancement Services
  Maintains expert-level knowledge about charitable giving as well as emerging trends within the charitable sector.

Provides technical expertise and counsel on financial and records management issues

- Provides management oversight for ensuring that Gift Acceptance policies and procedures are followed, and that CRA guidelines are adhered to.
- Is a key resource for complex gift administration and gift acceptance.
- Receives, reviews and provides management oversight & recommendations for gifts-in-kind acceptance, ensuring appropriate appraisals and internal authorizations are received.
- Is aware of and works with Finance Officer and Systems team to maintain appropriate controls and compliance for gift processing and records.
- Plays an important role in the preparation of budgets for service units in Operations
- Has delegated authority to sign for all operational expenses for Advancement Services
- Designs manual or automated information management systems to meet user requirements which includes conducting work flow and business process analyses writing specifications, procedures, preparing documentation and design/delivery of training as well as conducting work flow analyses, user support.
- The incumbent has the senior responsibility of ensuring and maintaining the highest standards of data integrity for all alumni, donor and constituent records.

Leads and manages direct reports and provides operational leadership on human resources function for University Advancement

- Acts as the primary contact with Human Resources re: staff salary accounts, merit increases, performance ratings, probation periods, and vacation credits, and payroll records management for University Advancement.
- Supports other units on HR issues.
- Recruit, train, coach and manage performance of staff. Establish, communicate, and maintain operating guidelines and procedures for staff in alignment with University policies and procedures.
- Coordinates performance management process for Advancement
- Tracks/monitors staff absenteeism, flex-time, vacation time

Strategic management across units

- Works closely with other senior administration in Advancement, Finance, SAFA, GSPA, and others, to develop and maintain advancement policies, procedures, guidelines, templates, associated to gift acceptance, counting and reporting standards, prospect management, naming and recognition, endowment and trust reporting.
- Collaborates with senior management on the development and implementation of campaign plans, processes, goals, reporting, budgeting, human resources, and program strategies.
- Supports, communicates, and reinforces the mission, values, culture of the organization.

Manages facilities

- Plans, organizes and implements strategies related to office space utilization, renovations, facility management, key control, security systems and the like to ensure resources are available and appropriate to support the Office of Advancement.
- Responsible for coordinating and assisting with the procurement of all services and equipment for the Office of Advancement.

Donor Relations

- Works directly with individual and organizational donors and lead development staff in the process of reminding donors about upcoming or overdue pledge payments; handling inquiries; and clarifying issues of concern or of a sensitive nature.
- Other duties as assigned.

**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

- Bachelor's degree or equivalent is required.
- Professional qualifications in business, finance, and/or human resources management is an asset.

Experience

- 7-10 years of progressive management experience preferably in an advancement environment.
- Proven track record of achievement and success with operations management.
- Experience with financial, budget, and project management.
- Proven people management experience and skills to effectively organize, direct, motivate, mentor, and evaluate staff.

Knowledge/Skills/Abilities

- Demonstrated knowledge of University of Waterloo policies related to gift acceptance and CRA charity guidelines.

- Demonstrated ability to build strong relationships, work collaboratively, and be sensitive to the needs and interests of various stakeholders
- Ability to lead by example with excellent customer service skills to internal and external constituents.
- Advanced proficiency with donor management systems and reporting (Raiser's Edge preferred) and intermediate skill level in Microsoft Office Suite.
- Superior writing skills, including grammar, spelling, editing, proofreading, and the ability to research and create reports.
- Ability to maintain absolute and complete confidentiality in all necessary matters, internally and externally.
- High degree of initiative and motivation with superior organizational skills, including the ability to effectively prioritize and manage multiple tasks and deadlines amidst competing priorities.
- Ability to advocate for team and operational needs while balancing department and university goal
- Sound judgement with excellent critical thinking, problem-solving and conflict resolution skills
- Proactive problem solver who will search to find necessary answers and solutions independently.

Nature and Scope

- **Contacts:** Internally, the Associate Director interacts regularly with the Associate Vice-President and is a key member of the Advancement Services leadership team and, as such, must have the ability to work collaboratively and effectively with peers. The incumbent must be able to lead and motivate individuals and groups and successfully mediate and negotiate with individuals and groups both externally and internally. The incumbent works closely with other senior administration in the Office of Advancement and Advancement leaders across the institution to plan, implement and execute strategic and operational services and best practices. Externally, this position will have significant contacts with donors, alumni and suppliers and will be involved in problem solving matters that are critical to the organization.
- **Level of Responsibility:** The position is responsible and accountable for the overall results of the operations group and must be able to effectively manage a large staff, multiple deadlines and tight time constraints.
- **Decision-Making Authority:** Responsible and accountable for establishing the priorities for several operational units and is responsible for developing and executing strategic business plans.
- **Physical and Sensory Demands**: Minimal demands typical of a management position operating within an office environment.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a management position exposed to stress and pressure associated with senior level responsibilities.