

## Job Description

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<b>Job Title:</b>	Associate Director, Advancement Strategic Research
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Associate Vice-President, Advancement Strategy
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 12
<b>Effective Date:</b>	July 2018

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### **Primary Purpose**

The Associate Director, Advancement Strategic Research is responsible for developing and presenting effective individual, corporate, and foundation donor strategies to ensure the growth of relationships and communication with the university's donors. The goal of this activity is to ensure increased philanthropic dollars raised at the major and principal gift level for the University of Waterloo. They will work in direct support of the President, VP Advancement and the AVP Advancement Strategy, mobilizing and translating research and intelligence gathered from across the institution into comprehensive strategies to engage, cultivate, and steward the University's top donors and prospects. The incumbent collaborates with stakeholders throughout the university and takes a leadership role in developing and overseeing briefing and research materials for use by campus senior leadership. They also support the AVP Advancement Strategy and the Director, Major and Principal Giving, Advancement Strategy in collaborative initiatives across the university-wide Advancement team and other campus units, with an emphasis on expanding the university's major and principal giving donor pipeline.

### **Key Accountabilities**

#### **Fundraising and Strategy Development**

- Provide timely, strategic intelligence and facilitate highly customized research to develop strategic approaches to develop and steward the University's top philanthropic relationships (individuals, corporations, and foundations)
- Serve with confidence in an advisory capacity to the President's Office, VP Advancement and Advancement Strategy team leaders regarding key developments with the university's top prospects and donors, and their ongoing progress at every step through the prospect management cycle
- Oversee and facilitate the creation of strategic call preparation materials and briefings for the President, VP Advancement, and Advancement Strategy Team leadership
- Develop and maintain a robust working knowledge of the University's activities and priority projects
- Support the AVP Advancement Strategy and the Director of Major and Principal Giving in building effective cultivation strategies and developing proposals for a portfolio of major and principal giving prospects
- Maintain a strong working knowledge of best practices in fundraising research, and approaches to prospect management and pipeline development, with an emphasis on campaign readiness

#### **Management**

- Assist in the development, implementation and evaluation of operating procedures and policies related to the efficient and effective operation of the Advancement Strategy team's portfolio and special initiatives
- Supervise one or more co-op student(s) and works collaboratively with the Prospect Research Team and support the activities of the Advancement Strategy Team

## Job Description



- Participate in budget development as it pertains to research tools and other key resources required for team initiatives

### **Administration and Reporting**

- Hire, train, supervise, and evaluate co-op students
- Responsible for developing reports and conveying key performance metrics of the Advancement Strategy team and senior leadership, particularly the President

### **Collaboration and Communication**

- Encourage close collaboration and sharing of knowledge and expertise between colleagues in Central Office (OA), the Faculties/Colleges and other UWaterloo business units
- Display ability to influence strategy development at the most senior levels
- Maintain strong communication and confident interaction with VP Advancement Office and Office of the President to ensure the effective planning, implementation, and follow-up of fundraising calls/events
- Collaborate regularly with the Associate Director, Prospect Research on projects and other initiatives, especially those related to prospect identification and pipeline development
- Liaise regularly with Faculty Advancement Teams, Development and Alumni Relations Team, Office of Research, Co-operative Education, and other key units to develop strategies to engage major corporate/foundation prospects

## **Required Qualifications**

### **Education**

- Completion of a bachelor's degree required
- Preference will be given to a candidate with a graduate degree

### **Experience**

- 5+ years of progressive experience in a fundraising setting, or equivalent experience in higher education, and a track record of developing effective strategies for major and principal gift prospects

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

- Superior written and verbal communication skills, research aptitude, and strong organizational capabilities
- Ability to set priorities and manage multiple tasks of high value to the institution
- Strong collaboration and influencing 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 reporting and data analysis skills

## **Nature and Scope**

- **Contacts:** Communicates regularly with stakeholders across campus from all levels of the Institution representing the department with strong interpersonal skills and eye for detail to ensure that and motivate others, direct strategy, and to promote, justify and settle highly sensitive matters. Participates and/or leads meetings with external corporate partners in order to fully develop and maximize strategy.
- **Level of Responsibility:** Supervises and coaches co-op students, provides direction to research officers, influences decision making at the principal level donor strategy table, directs strategy for implementation with the President, VP Advancement, and AVP Advancement Strategy.
- **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

## Job Description



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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 occasional travel on and off campus.
- **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 deadlines, interact with a diverse client base including other members of the Waterloo fundraising team, VP Advancement, President and President's office staff, faculty members, deans and senior administration and staff of other university business units.