

## Job Description

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| <b>Job Title:</b>      | Senior Alumni Experience Officer |
| <b>Department:</b>     | Office of Advancement            |
| <b>Reports To:</b>     | AVP, Engagement or Designate     |
| <b>Jobs Reporting:</b> | None                             |
| <b>Salary Grade:</b>   | USG 11                           |
| <b>Effective Date:</b> | November 2024                    |

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### **Primary Purpose**

The Senior Alumni Experience Officer (SAXO), identifies, cultivates, stewards, and solicits alumni and donors for the University of Waterloo. The incumbent will be a relationship-building focused individual with the ability to make a financial ask if the opportunity presents itself. They will build a robust pipeline of alumni with the focus of furthering alumni engagement through digital engagement, high volume personalization, and movement through the pipeline. Working closely with the Senior Donor Experience Officer, this position will move prospects between the alumni and donor pipelines to ensure that there is growth in engagement and that they are moving prospects into gift conversations when appropriate. This position will serve as a major communication liaison and lead generator for Waterloo's academic faculties, Affiliated and Federated Institutions of Waterloo (AFIW) and Academic Support Units (ASU) to ensure seamless sharing of information related to alumni engagement strategies and activities.

### **Key Accountabilities**

#### **Fundraising**

- Formulates, recommends, and implements qualification, cultivation, solicitation, and stewardship strategies to secure gifts from current donors, alumni, faculty, staff, retirees, and friends.
- Maintains/updates contact reports and the database by ensuring that meeting notes are recorded, and significant moves are tracked in the system in a timely fashion.
- Develops knowledge of giving vehicles and non-complex gifts.
- Refers planned giving and alumni engagement leads to appropriate colleagues.

#### **Alumni engagement**

- Formulates, recommends, and implements qualification, cultivation, engagement, and stewardship strategies to secure enhanced engagement from current donors, alumni, faculty, staff, retirees, and friends.
- Utilizes a dual pipeline system with a number of alumni that will be treated as typical frontline assigned prospects while maintaining a parallel secondary pipeline of unassigned prospects through automated tools.
- Utilizes digital engagement tools through automated touchpoints (videos, emails, texts, etc.) to maintain engagement with all alumni in both groups.
- Generates leads for faculty/area partners based on activity between both assigned and unassigned pipelines and works with faculty/area partners to enhance engagement for their alumni prospects that are yet to be assigned.
- Achieves a high volume of alumni contact annually as determined by performance metrics.

#### **Program administration**

- Develops and maintains a good working knowledge of the University of Waterloo's activities, priorities, and engagement opportunities.
- Analyzes trends and results and provides input regarding alumni engagement strategies and the annual Engagement plan.
- Works with the AVP to set goals and regularly review alumni activity.
- Generates written materials associated with the alumni donor experience, such as reports and general correspondence.

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### **Collaboration, communication and cross-program coordination**

- Assists Alumni Donor Experience colleagues in creating engagement and fundraising materials suitable for presentation to prospective contributors.
- Serves as an effective ambassador for the university and broader Engagement team.
- In collaboration with the donor relations and alumni relations teams, works towards achieving exemplary stewardship of assigned prospects/alumni.
- Works in close collaboration with colleagues in academic faculties, Affiliated and Federated Institutions of Waterloo (AFIW) and Academic Support Units (ASU).

### **Coordination and special projects**

- Assists with identifying engagement opportunities across campus.
- Undertakes special projects as assigned by the AVP, Engagement.
- Ensures that fundraising and engagement efforts across different teams remain in line with Waterloo standards and best practices.

## Required Qualifications

### **Education**

- University degree or equivalent education and experience required

### **Experience**

- Five years of proven alumni engagement, fundraising and/or developing meaningful partnerships with proven results, high volume prospect activity and best in class interpersonal relationships.
- Understanding of the university and advancement environments.
- Proven experience with project management with a demonstrated ability to manage simultaneous projects under tight deadlines preferred.
- Proven experience working within a campus environment and specifically with university alumni.
- Proven experience working in a complex fast-paced environment preferably in the post-secondary sector.
- Writing and/or editing experience an asset.

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

- Understanding and appreciation of the key role of a university education, and the crucial importance of attracting and retaining the very best talent available (students, faculty, staff)
- Some knowledge of giving vehicles and non-complex gifts.
- Great analytical and organizational skills.
- Proven ability to work collaboratively and communicate with internal departments and external stakeholders.
- Demonstrated expertise using persuasion and negotiation skills to build support and cooperation involving individuals as well as groups, often with different perspectives and concerns.
- Excellent communication, interpersonal, oral, and writing skills, including experience with promotional materials, reports and proposals.
- Proficient in utilizing internet and CRM research tools for prospect identification and management.
- Political acumen and problem-solving skills are required.
- Capable of professionally representing the University at alumni events.
- Professionally skilled in relationship qualification, cultivation and stewardship that also involves external visits.
- Demonstrated ability to take initiative, and work independently and effectively as part of a team with a broad mandate in a fast-paced, highly computerized, and challenging environment.
- Willingness to travel and work extended hours, as required.
- Proficient in MS Office and Constituent Management Software (or similar).

## Nature and Scope

- **Contacts:** This position represents the university and the Office of Advancement to internal (collaborating units, faculty, and staff). and external (alumni, donors and community) stakeholders. This is an external facing position which requires significant amounts of networking and social

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engagement, supported by internal partners. Must be comfortable working with a variety of stakeholders including political and community leaders, executives, industry partners, volunteers and senior campus leaders.

- **Level of Responsibility:** This position has specialized work with minimal supervision, acts in collaboration with Advancement staff across many units, and may provide guidance to others. Represents the Office of Advancement to internal stakeholders (faculty and staff) and represents the University of Waterloo to external stakeholders.
- **Decision-Making Authority:** Independently makes decisions, with guidance from the AVP, Engagement, about prospect strategies, location and event strategies for engagement, working collaboratively with Advancement team members.
- **Physical and Sensory Demands:** Minimal demands typical of a senior administrative position operating within an office environment. Anticipate travel within Southwestern Ontario and possibly throughout Canada.
- **Working Environment:** Minimal exposure to disagreeable conditions; deadline pressures with demand for thoroughness and accuracy typical of program administration responsibilities.