

## Job Description

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<b>Job Title:</b>	Director, Annual and Planned Giving
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Associate Vice-President, Development
<b>Jobs Reporting:</b>	Senior Development Officer, Annual Giving Senior Development Officer, Planned Giving Development Officer, Annual Giving Development Coordinator
<b>Salary Grade:</b>	USG 14
<b>Effective Date:</b>	April 2020

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### **Primary Purpose**

Responsible for leading and managing Annual Giving and Planned Giving as part of the Development team within the Office of Advancement.

The Director, Annual and Planned Giving is responsible for developing and implementing a broad-based, multi-channel, and integrated fundraising strategy for the Annual Giving and Planned Giving programs. The Director, Annual and Planned Giving has a critical role to play in securing annual and planned gifts from important constituencies such as alumni, students, parents, faculty, staff, retirees, and friends to increase the donor pipeline and philanthropic support for the University of Waterloo.

This role liaises closely with all fundraising teams across the university to coordinate, align, and grow fundraising initiatives for annual giving (gifts <\$25,000), memorial/tribute giving (in memoriam gifts and in honour gifts), and planned giving (bequests, RRSPs/RRIFs, life insurance, securities and mutual funds, charitable gift annuities, charitable remainder trusts, gifts-in-kind, etc.). The Director, Annual and Planned Giving must work cooperatively with colleagues across Advancement and with numerous stakeholders across campus to ensure that these programs are successful.

### **Key Accountabilities**

#### **Annual Giving**

- Oversees the identification, qualification, cultivation, solicitation, and stewardship of approximately 8,600 donors who give \$4.1 million in annual gifts per fiscal year
- Develops and implements fundraising strategies for the multi-channel solicitation (phone, mail, email, social, digital, etc.) of annual gifts from alumni, students, parents, faculty, staff, retirees, and friends, and ensures that annual giving programs are coordinated
- Provides strategic counsel and oversight of the Annual Fund program (donors who give <\$1,000 annually), Circle program (donors who give between \$1,000-\$24,999 annually), and Keystone program (faculty, staff, and retirees who give any amount annually)
- Sets and monitors progress toward annual giving goals including revenue and pipeline development e.g. new donors, recurring gifts, retention rate, average gift, calls/meetings, leads/referrals given, and/or other metrics
- Develops communications, events, and other engagement strategies for the cultivation, recognition, and stewardship of annual donors
- Develops the marketing plan, including case for support development, for annual giving
- Develops a peer-to-peer solicitation strategy for annual giving
- Leads the Giving Tuesday campaign and assists with special appeals
- Serves as an in-house expert on annual giving for Advancement, and provides collaborative

## Job Description

<p>assistance to development officers as requested</p> <ul style="list-style-type: none"> <li>• Acts as an advocate for Annual Giving across Advancement</li> <li>• Participates in the identification, recruitment, training, management, and stewardship of volunteers to support annual giving initiatives</li> <li>• Prepares contact notes for prospect tracking and clearance systems</li> </ul>
<p><b>Planned Giving</b></p> <ul style="list-style-type: none"> <li>• Oversees the identification, qualification, cultivation, and solicitation of planned gift prospects, as well as the stewardship of approximately 750 donors who have committed to give \$116 million in future gifts and approximately 1,050 donors who give \$850,000 in memorial/tribute gifts per fiscal year</li> <li>• Develops and implements fundraising strategies for the multi-channel solicitation (phone, mail, email, social, digital, etc.) of planned gifts from alumni, students, parents, faculty, staff, retirees, and friends, and ensures that planned giving programs are coordinated</li> <li>• Provides strategic counsel and oversight of the planned giving program and memorial/tribute giving program</li> <li>• Sets and monitors progress toward planned giving goals including revenue and pipeline development e.g. new commitments, total commitments, average commitment, calls/meetings, leads/referrals received, and/or other metrics</li> <li>• Develops communications, events, and other engagement strategies for the cultivation, recognition, and stewardship of Laurel Society members (donors who have made a planned gift commitment)</li> <li>• Develops the marketing plan, including case for support development, for the planned giving program and memorial/tribute giving program</li> <li>• Administers planned gifts, and works closely with executors, trustees, lawyers, insurance professionals, and financial advisors to ensure the gifts are in accordance with the donor's wishes and in the best interest of the university</li> <li>• Oversees the memorial/tribute giving program and maintains an inventory of memorial/tribute rocks, trees, and benches across campus</li> <li>• Serves as an in-house expert on planned giving and memorial/tribute giving for Advancement, and provides collaborative assistance to other development officers as requested</li> <li>• Acts as an advocate for Planned Giving across Advancement</li> <li>• Participates in the identification, recruitment, training, management, and stewardship of volunteers to support planned giving initiatives</li> <li>• Prepares contact notes for prospect tracking and clearance systems</li> </ul>
<p><b>Relationships and Collaboration</b></p> <ul style="list-style-type: none"> <li>• Leads the Annual and Planned Giving team in working closely and cooperatively with the Faculty and College Advancement teams, the Development team, and the Alumni Relations team to ensure cross-program coordination and effectiveness</li> <li>• Ensures regular, open communication with the Advancement Services team with respect to internal processes and data issues to ensure the smooth operation of annual and planned giving programs</li> <li>• Leads the management of the call centre vendor relationship, as well as relationships with other annual or planned giving vendors and consultants</li> <li>• Assists with volunteer management strategies and management of key volunteer relationships</li> <li>• Maintains contact with annual and planned giving leaders at other higher education institutions for the purpose of benchmarking, strategy development, and sharing best practices</li> <li>• May personally manage and solicit a select group of prospects and donors</li> </ul>
<p><b>Management</b></p> <ul style="list-style-type: none"> <li>• Recruits, manages, and motivates 4-6 direct reports</li> <li>• Provides leadership, direction, feedback, coaching, training, and mentoring to staff</li> <li>• Works closely with, and provides feedback to, the Manager, Call Centre around hiring, training, and supervising 30-50 student callers</li> <li>• Manages and monitors an annual budget of approximately \$1.2 million</li> </ul>

## Job Description

### Other

- Serves as an annual and planned giving advocate for Raiser's Edge and iModules initiatives, as well as all future implementations, migrations or launches of other fundraising software and/or online giving platforms
- Researches best practices and stays up-to-date regarding industry trends, fundraising tools, and strategies for annual and planned giving
- 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 is required
- Advanced degree is an asset
- CAGP Gift Planning Fundamentals Course is an asset
- CAGP Original Canadian Gift Planning Course is required
- CFRE certification is an asset

#### Experience

- 8+ years of progressive fundraising experience with a proven track record of achievement and success in annual giving and/or planned giving
- Demonstrated management/supervisory experience in a fundraising environment including the recruitment, management, and coaching of staff
- Experience in developing strategic plans, gaining endorsement of plans from various stakeholders, and providing evaluative reports and recommendations to drive strategy
- Experience collaborating with diverse teams, preferably in a decentralized organization, and influencing project outcomes without direct supervisory experience
- Experience with telemarketing and volunteer management
- Strong background in developing and executing complex appeal segmentation, manipulating and analyzing large datasets, and deriving insights from multiple streams of information

#### Knowledge/Skills/Abilities

- Demonstrated planning, teamwork, and project management abilities
- Excellent interpersonal, communication, and problem-solving skills
- Sound judgment, tact, and diplomacy are essential
- High degree of personal initiative and motivation
- A working knowledge of the university environment is a definite asset
- Familiarity with various types of planned gifts and vehicles
- Proficiency with The Raiser's Edge, Blackbaud CRM, and iModules Encompass

### Nature and Scope

- **Contacts:** Communicates regularly with stakeholders across campus from all levels of the institution, representing the department with strong interpersonal skills and an eye for detail. Works to motivate others, direct strategy, and to promote, justify, and settle highly sensitive matters. Significant external relationships include with alumni, parents, friends, and external vendors.
- **Level of Responsibility:** Manages or provides functional direction to development officers, co-op students, and other staff. Identifies, recruits, advises, and manages volunteers (alumni, students, parents, faculty, staff, and retirees) for various fundraising projects. Influences decision-making on fundraising strategy, and directs strategy for implementation with various staff and senior leaders.
- **Decision-Making Authority:** The Director works with confidential and sensitive issues relating to

## Job Description

donors' philanthropy. The incumbent leads strategy development that impacts the donor pipeline, providing the foundation for the future success of other fundraising teams. The impact of decisions of the incumbent will have significant effect on the fundraising program and the university.

- **Physical and Sensory Demands:** There is a frequent need to give close attention to various stimuli such as written material and information given verbally to co-workers. The work is varied. There are deadline pressures, while at the same time there is a demand for thoroughness and accuracy. Recommend program modifications when necessary and determine task priority in a multi-tasking, deadline-oriented environment. 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 a Director position exposed to stress and pressure associated with senior level responsibilities. The Director requires an ability to work under pressure, juggle multiple deadlines, and interact with a diverse client base. The Director, Annual and Planned Giving will be required to work some evening and weekend hours.