Job Description

Job Title:	Associate Director, Annual Giving
Department:	Office of Advancement
Reports To:	AVP, Engagement
Jobs Reporting:	Development Officers
Salary Grade:	USG 12
Effective Date:	October 2023

Primary Purpose

The Associate Director, Annual Giving is responsible for developing and implementing an integrated strategy for the university's annual giving programs. The goal of this activity is to ensure a strong foundation of donors and philanthropic dollars raised at this level for the University of Waterloo. The Associate Director, Annual Giving has a critical role to play in developing and evaluating strategies to encourage annual gifts from important constituencies including alumni, students, parents, staff, faculty, retirees and friends. The Associate Director must work cooperatively with colleagues across Advancement and with numerous stakeholders across campus to ensure that programs are implemented successfully.

Key Accountabilities

Fundraising and Program Development

- Develops and oversees fundraising strategies for the annual multi-channel solicitation (telephone, mail, email, social etc.) of alumni, parents, friends, staff, faculty and retirees within a data-driven framework
- Prepares annual strategic plans, with responsibility for revenue targets and pipeline development, along with other metrics, including donor counts, acquisition, retention, reactivation, upgrades and appeal performance
- Develops strategy and provides oversight for family campaign (faculty, staff, retirees) and specialty campaigns, and ensures that annual giving programs are coordinated
- Develops event planning, communication and engagement strategies for cultivation, recognition and stewardship of annual donors, including oversight of the university's annual giving recognition program (donors who give between $1,000 and $24,999)
- Leads development of peer-to-peer solicitation strategies for annual giving programs
- Develops the marketing plan and strategy, including case for support development, for all annual programs

Relationship Management and Collaboration

- Leads the Annual Giving team in working closely and cooperatively with Faculty, AFIW, and ASU advancement teams, Marcomm, and the rest of the Engagement team including Planned Giving, Leadership Giving, Alumni Relations, and Alumni and Donor Experience to ensure cross-program coordination and effectiveness
- Collaborates with the Alumni and Donor Experience team to ensure that these programs are properly integrated with other annual giving appeals and broader pipeline development strategies and activities
- Ensures regular, open communication with the Advancement Services team with respect to internal processes and data issues to ensure the smooth operation of all annual giving programs

- Will lead the strategy around the Engagement Centre to help engage alumni and donors over the phone
- Assists with volunteer management strategies and management of key volunteer relationships
- Maintains contact with annual giving leaders at other institutions for the purpose of benchmarking, strategy development and best practice consideration
- May personally manage and solicit a select group of prospects and donors
- Prepares contact notes for prospect tracking and clearance systems

Management

- Recruits, trains, manages and evaluates permanent and temporary team members
- Will eventually works closely with, and provide feedback to, the Engagement Centre Manager around hiring, training and supervising student callers
- Develops, manages and monitors an annual budget in collaboration with the AVP, Engagement

Other

- Special Appeal projects
- Serves as annual giving advocate during software migrations/launches, including new customer relationship management (CRM) software
- Develops strategy for email marketing and other future digital strategies
- Researches best practice and innovation in fundraising programs, platform and strategies
- 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

- University degree or equivalent combination of education and/or experience

Experience

- 5+ years of experience in annual fundraising, telemarketing and volunteer management in a complex environment
- Strong background in developing and executing complex appeal segmentation, manipulating and analyzing large datasets, and deriving insights from multiple streams of information
- Demonstrated management/supervisory experience in an Annual Giving/Fundraising environment including the recruitment, training and motivation 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 frontline fundraising is an asset

Knowledge/Skills/Abilities

- Demonstrated planning, teamwork and project management abilities
- Excellent interpersonal, communication, and problem-solving skills
- Sound judgment, tact, and diplomacy is essential
- Familiarity with various gift types and vehicles
- High degree of personal initiative and motivation
- Willingness to travel; work some evenings and weekends during peak periods

- Proficiency working with complex relational databases, familiarity with alumni and donor databases an asset (e.g. Raiser's Edge, Blackbaud CRM, iModules Encompass)
- The ability to be a self-starter and calculated risk taker is necessary

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. Participates and/or leads meetings with external corporate partners in order to fully develop and maximize strategy. Works in particularly close partnership with University Relations, Co-operative Education and Career Services, the Office of Research, the Office of the Associate Provost, Students and associated units, the Office of the Registrar and Student Awards and Financial Aid. Significant external relationships include alumni, parents, friends of the University, corporations, and external vendors.
- **Level of Responsibility:** Manages or provides functional direction to development officers, co-op students and other staff in developing and implementing a variety of special appeals. Identifies, recruits, advises and manages volunteers (alumni, students, faculty, staff, parents and retirees) for various fundraising projects. Influences decision making on fundraising strategy, directs strategy for implementation with various staff and senior leaders.
- **Decision-Making Authority:** The Associate Director works with confidential and sensitive issues relating to the donor's philanthropy. The incumbent leads strategy development that impacts the base of the donor pipeline, providing the foundation for 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; 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 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. The Associate Director, Annual Giving will be required to work some evening and weekend hours.