

## Job Description

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<b>Job Title:</b>	Alumni Development Officer
<b>Department:</b>	School of Accounting and Finance
<b>Reports To:</b>	Associate Director, Advancement
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	9/10
<b>Effective Date:</b>	November 22, 2017

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### **Primary Purpose**

The Alumni Development Officer, School of Accounting and Finance works within the context of the University's Office of Advancement and reports to the Associate Director of Advancement, School of Accounting (SAF), within the Faculty of Arts.

The incumbent is responsible for supporting the strategic integration of two primary advancement programs - development (fundraising) and alumni engagement with support from the Office of Advancement resources. The incumbent will work closely with internal staff to plan, coordinate, manage, implement and evaluate strategic and successful integrated alumni and development programs and activities designed to foster and strengthen ongoing relationships between the School and its graduates for the purpose of meeting overall advancement and fundraising goals.

Specifically, the incumbent will support the development of a pool of engaged alumni and friends who will assist the School in achieving goals such as student mentorship, co-op hiring, brand promotion as well as financial contributions and connections with potential supporters. The incumbent will provide functional direction to assistants, such as the SAF Advancement Assistant, co-op and Fellowship students involved in these activities, where applicable.

### **Key Accountabilities**

#### **Alumni and Friends Engagement**

- Participates in the development of the annual advancement strategic plan, offering new ideas and strategies for alumni engagement and fundraising activities
- Develops and maintains a good working knowledge of the School's activities, priorities and needs in both teaching and research and a thorough working knowledge of priority fundraising projects
- Supports the development of effective strategic plans to implement an integrated alumni engagement program that aligns with major gift fundraising goals, and evaluates and adjusts tactics as required
- Acts as the primary manager and contact with the UW SAF Alumni Association and leads to help the association work toward assisting in accomplishing advancement strategic goals
- Identifies, recruits and manages volunteers (faculty, alumni, corporate volunteers, UW friends and staff) for the purpose of supporting SAF goals including fundraising projects and School programs as required

#### **Development (Fundraising)**

- In conjunction with SAF Associate Director of Advancement, develops personal annual fundraising target and goals, including size of prospect pool, number of meetings and dollars raised
- Develops, plans, implements and evaluates fundraising strategies for corporate, foundation, individuals and alumni sectors, including cultivation, solicitation and stewardship activities

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- Maintains a portfolio of alumni and friends prospects assessed as having the ability, or potential, to make gifts between \$10,000 to \$50,000
- Coordinates special projects, stewardship activities and customized plans for prospects and donors as needed
- In coordination with Central Advancement policies and procedures, creates donor gift agreements, endowment and stewardship reports as required

### **Alumni Programs**

- Strategically guides and implements a variety of alumni outreach and engagement programs, such as the 25th Anniversary Reunion, annual Reunion activities, Alumni Awards Celebration committee, convocation
- Provides direction and advice to SAF student groups for various needs and alumni requests and the Master of Accounting Class Champion Program
- Serves as the liaison for the SAF to Central Advancement for alumni programs, services and activities such as annual fund and Call Centre and an active member of the Alumni Professionals Group
- Provides team support as required to all SAF alumni activities and events as required

### **Data Management and Reporting**

- Ensure correspondence and reporting related to relationships with alumni, prospects and donors are managed and recorded in accordance with Office of Advancement systems
- Complete follow up correspondence, briefings and updates to alumni, prospects, donors and internal stakeholders

### **Communication**

- Participates in the development of the SAF advancement communication plan
- Creates effective alumni and friends engagement material and fundraising materials for presentation to prospects/donors by coordinating content from SAF staff and faculty and working with central Advancement and additional university departments such as creative services
- Develops solicitation proposals for projects tailored to the specific interests of prospects
- Actively strengthens the uWaterloo and SAF brand through the active integration of, and adherence to messaging, strategies and processes
- Proactively and consistently communicates with internal and external stakeholders, including students as required
- Uses social media as required to communicate with target audiences

## **Required Qualifications**

### **Education**

- University degree or equivalent combination of education and relevant experience

### **Experience**

- USG 9: 1-3 years of progressive fundraising experience
- USG 10: 3-5 years of progressive major gift fundraising experience in securing major gifts, relationship management and volunteer recruitment and management
- Experience with the full scope of development activities including identification, cultivation, solicitation, recognition and stewardship at the major gift level required
- Experience recruiting and working with volunteers to support program development, advisory boards and fundraising activity such as cultivation and solicitation strategies is a strong asset
- Experience fundraising in a university environment considered an asset

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

- Successful track-record of developing and implementing strategy for major gift solicitation with demonstrated success in personally securing and closing major gifts
- Excellent communication skills, written and oral, including expertise in creating donor-focused and impactful proposals
- Proven competence in project management, multi-tasking, planning, analytical and organizational skills
- The ability to work in a face paced, highly complex and demanding environment, managing and collaborating with multiple partners, from across campus and externally
- Proven political acumen and problem solving skills
- Goal oriented, self-motivated with 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
- Hands-on experience with a relational fundraising database such as Raisers Edge is a strong asset
- Specialized work with minimal supervision, acts in collaboration with advancement staff across many units
- Networking and social engagement is required
- Must be comfortable working with a variety of stakeholders including political and community leaders, executives, industry partners and volunteers
- Some travel within Canada and possible travel to International locations may be requested
- Regular working hours, some evening/weekend work required

### **Nature and Scope**

- **Contacts:** Director, School of Accounting and Finance, Advancement, Faculty of Arts Team, Central Office of Advancement – Alumni Affairs, Annual Giving, Prospect Research, SAF, Recruitment and Marketing Team SAF, Experiential Learning and Career Development Team, SAF, Student Relations Coordinator (SAF Fellowship Honouree Program), Student Awards and Financial Aid Office, Graduate Studies Office, Prospects and donors for qualification, cultivation, solicitation and stewardship purposes, SAF Alumni UW SAF Alumni Association
- **Level of Responsibility:** This position has specialized work and measured outcomes. It functions in a constructive team environment, but equally requires the ability to progress initiatives and work independently with minimal supervision. This is not a supervisory position but recommendations and/or guidance to colleagues is required.
- **Decision-Making Authority:** Independently makes decisions about prospect strategies, location and event strategies for engagement with guidance from the Associate Director, SAF Advancement and works collaboratively with SAF staff and the Advancement team.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment.
- **Working Environment:** Office based with travel to meet external community, local and global.