Job Description

Job Title:	Senior Director, Principal Gifts
Department:	Office of Advancement
Reports To:	Vice President Advancement
Jobs Reporting:	Associate Director, Principal Gifts (Senior) Development Officer, Principal Gifts
Salary Grade:	USG 15
Effective Date:	July 2023

Primary Purpose

The Senior Director of Principal Gifts is accountable to the Vice President Advancement and is responsible for promoting the Advancement priorities of the University. The incumbent works to enhance the reputation of the University of Waterloo by developing and directing effective individual, corporate and foundation strategies with our most significant donors. The goal of this activity is to ensure increased philanthropic dollars raised at this level for the University of Waterloo. They work directly with the President and Vice President Advancement, advising and supporting them in meeting the University's fundraising goals with the University's top donors/prospects. They will also prepare and accompany the President, VPA and other senior Academic and/or ASU leaders on calls and oversee preparation, execution and follow-up activity for donor meetings that involve the President to ensure that they align with the institutional strategy and goals of the University.

Key Accountabilities

Fundraising

- Establish and implement the fundraising strategic plan for Principal Gifts and monitor and evaluate its effectiveness on an ongoing basis
- Perform a leadership role in advising and supporting the President and VPA in meeting the University's fundraising goals, including preparing and accompanying leaders on calls and overseeing preparation, execution and follow up activity for donor meetings at the highest level
- Direct, develop and steward UW relationships, to secure private sector gifts from individuals, corporations, and foundations at the $1M plus level
- Manage a prospect pool of up to 80 major and principal ($1 million dollars + capacity) prospects; develop and implement tailored action plans/strategies for identifying, cultivating, soliciting and stewarding prospects
- Complete 75-80 calls with Top 100 individual, corporations/foundation prospects/donors, with 50% or more being face to face, and at least 50% with the President or other UWaterloo senior leaders
- Responsible for generating $10M plus in new donor commitment annually
- Initiate and manage complex donations, bequests including complex multi vehicle gifts both current and deferred
- Develop and maintain excellent working knowledge of the University's activities and priority projects
- Direct the development and review of proposals, strategies, gift agreements, stewardship plans and events developed for Principal Gift prospects/donors
- Develop new markets and opportunities to support priority projects in geographic areas identified through strategic planning and consultation with the VPA
- Design and implementation of special projects as needed

Management

- Provide leadership to direct reports as well as strategic support of others involved in Principal Giving activity across campus including setting priorities, fostering constructive working relationships and providing strategic direction and decision support
- Assume the day to day administrative and supervisory responsibilities for direct reports and monitor their workload as well as meet resource needs as team grows to meet the Campaign needs
- Acting act on behalf of the VPA in their absence.
- Oversee the development, implementation and evaluation of operating procedures and policies related to the efficient and effective operation of the principal gifts portfolio
- Responsible for managing/orienting senior volunteers and subject matter experts for the purpose of making fundraising calls

Administration and Reporting

- Ensure compliance with all relevant University policies, procedures and processes
- Record detailed notes for prospect tracking and clearance systems, and prepare regular progress reporting on fundraising targets through standardized reporting tools to gauge the effectiveness of activity on ongoing donor strategies

Communication and Internal Collaboration

- Encourage close collaboration and sharing of knowledge and expertise between colleagues in Central Office (OA), the Faculties/Colleges and other UWaterloo business units
- Build and reinforce pipelines and strategies with relevant Faculty Advancement Directors, Institute Directors and other university staff, faculty and senior administration to acquire funds in the range of $1M-20M plus
- Develop and leverage partnerships with Office of Research, Co-operative Education, Advancement Services and Alumni Relations to maximize revenue generation and build broad based relationships with large corporations
- Ensure that all University leaders, faculty and staff involved in the strategy for a prospect/donor are consulted and involved in the implementation of pan-university fundraising plans

**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

- Completion of a Bachelor's degree, advanced degree would be an asset
- CFRE certification

Experience

- 10+years of progressive fundraising experience with a proven track record of achievement and success with raising funds at the $1M plus level from individuals, corporations and foundations.
- Experience with people management (directly or indirectly) considered an asset

Knowledge/Skills/Abilities

- Ability to thrive under pressure and juggle multiple timelines
- Strong negotiation and mediation 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 communication and interpersonal skills
- Excellent judgment and ability to nurture key relationships

Nature and Scope

- **Contacts:** Communicates regularly with stakeholders across campus from all levels of the institution, representing the department with strong interpersonal skills to influence and motivate others, and to promote, justify and settle highly sensitive matters. Sensitivity to the diverse student and staff population on campus, often working with confidential and sensitive information requiring a mature and professional demeanor. External contacts include individuals with high net worth, senior leaders of industry, executive staff and board members, and government representatives.
- **Level of Responsibility:** The Senior Director is responsible for advising, supporting and assisting the President and VPA and ensuring that the University's fundraising goals are met.
- **Decision-Making Authority:** The Senior Director works with confidential and sensitive issues relating to the donor's philanthropy. The impact of decisions of the incumbent will have significant effect on the fundraising program and the University. The Senior Director makes decisions on the call strategy and follow up activity of many of the University's top donors.
- **Physical and Sensory Demands**: Minimal physical demands typical of an office environment and the demands related to significant travel.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a Senior Director position exposed to stress and pressure associated with senior level responsibilities. The Senior Director requires an ability to work under pressure, juggle multiple timelines, negotiate with donors, mediate among staff and faculty, interact with a diverse client base including other members of the Waterloo fundraising team, the President, faculty members, deans and senior administration and staff of other university business units.