

Job Description

Job Title:	Director, Principal Giving
Department:	Advancement Strategy
Reports To:	Associate Vice President, Advancement Strategy
Jobs Reporting:	Senior Stewardship Officer, Advancement Strategy Advancement Coordinator, Advancement Strategy Associate Director, Principal Giving
Salary Grade:	USG 14
Effective Date:	January 2018

Primary Purpose

The Director of Principal Giving is responsible for developing and directing effective individual, corporation and foundation donor strategies to ensure the growth of relationships and communication with our largest donors. The goal of this activity is to ensure increased philanthropic dollars raised at this level for the University of Waterloo. S/he works directly with the President, VP Advancement and the AVP Advancement Strategy; advising, supporting and assisting them in meeting the University's fundraising goals as they relate to the University's top donors/prospects. He/she will also prepare and accompany the President, VP Advancement and AVP Advancement Strategy 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

- Perform a leadership role in advising, supporting and assisting the President, VP Advancement and AVP Advancement Strategy in meeting the University's fundraising goals, including preparing and accompanying the leaders on calls and overseeing preparation, execution and follow up activity for donor meetings that involve the President
- 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 principal (\$1 million dollars plus) 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
- Analyze and interpret research and data on corporate growth/change (mergers, acquisitions, share prices, impact on change in leadership etc.) and apply it to fundraising strategy
- Initiate and manage complex donations, bequests including complex multi vehicle gifts both current and deferred
- Develop and maintain a good 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

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- Develop new markets and opportunities to support priority projects in geographic areas identified through strategic planning and consultation with the VP Advancement and the AVP Advancement Strategy
- Assist in the design and implementation of a comprehensive annual and long-range strategic plan for the Advancement Strategy team, which may be annual operating or campaign oriented
- Assist in the design and implementation of special projects as needed

Management

- Assume the day to day administrative and supervisory responsibilities for the Team during the frequent absences of the AVP Advancement Strategy due to a demanding travel schedule
- Assume direct management and supervisory responsibilities as the team grows to meet the resource needs of the Campaign Plan
- Assist in 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 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
- Direct the development and application of 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

Required Qualifications

Education

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

Experience

- 8+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

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| <ul style="list-style-type: none">• Excellent judgment and ability to nurture key relationships |
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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 demeanour. External contacts include individuals with high net worth, senior leaders of industry, executive staff and board members, and government representatives.
- **Level of Responsibility:** The Director is responsible for advising, supporting and assisting the President, VP Advancement and AVP Advancement Strategy and ensuring that the University's fundraising goals are met.
- **Decision-Making Authority:** The 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 Director makes decisions on the call strategy and follow up activity of some 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 Director position exposed to stress and pressure associated with senior level responsibilities. The 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.