

Job Description

Job Title:	Associate Director, Advancement
Department:	Dean of Mathematics
Reports To:	Director of Advancement, Faculty of Mathematics
Jobs Reporting:	Donor Relations Officer, Alumni Officer, Development Communications Officer, Advancement Coordinator
Salary Grade:	USG 12/13
Effective Date:	December 2019

Primary Purpose

The Associate Director, Advancement is responsible for the development and implementation of the annual fundraising plan, donor relations, and alumni affairs plans and strategies in several key program areas such as the Keystone, affinity groups, and Giving Tuesday. Using professional expertise in fundraising, alumni relations, and donor relations the Associate Director, Advancement, is responsible for overseeing major gifts fundraising activity, managing a personal portfolio of major and principal gift prospects and donors and for Math's overall annual donor and alumni relations strategy.

Key Accountabilities

Annual Fundraising

- Provides strategic oversight and is responsible for the Annual Fund activities of the Faculty
- Works with the Math Advancement team to articulate the Faculty fundraising priorities for incorporation into central annual giving activities aimed at achieving a high rate of participation among Students, Parents, Alumni, Faculty, Staff, Retirees, Friends, and Affinity groups of the Faculty of Mathematics.
- Oversees and directs the strategic development of cultivation and solicitation plans and gift proposals for specific projects, including written proposals, oral presentations and volunteer management.
- Tracks the progress of proposals and intermediate strategies for moves between submission and decision to ensure timely closure.
- Reviews and analyzes donor reports including custom reports and central advancement reports in order to track progress to goal.
- Accepts all gift types, with expert assistance, and develops terms of reference.
- May develop a budget and has the technical ability to manage a budget for annual fund, alumni relations, and donor relations.
- Encourage the partnerships between Faculty of Mathematics advancement staff and key Annual Giving staff in order to build strategy around identifying, cultivating, soliciting and stewarding Circle level and Faculty/Staff/Retiree donors and prospects.
- Develops immediate and long-range plans for comprehensive programs to realize the potential from individuals for various levels of gifts.
- Assumes primary responsibility for a significant portfolio of major gift prospects and donors (\$100,000 +); develops and implements tailored action plans, solicitation strategies and proposals, and stewardship plans for each prospect; makes face-to-face calls both with and without key volunteers and University faculty.
- Provides strategic service support and assistance as required to members of the Faculty of Mathematics involved in program implementation.

- Works collaboratively with the Office of Advancement and other university units to match donors' interest with university priorities.
- With the Director of Advancement, plans, creates, organizes and executes the Faculty's Annual Fund Program; establishes a prospect review program to evaluate giving potential of individual, corporate and foundation prospects across Canada and internationally.
- Initiates relationships with potentially generous donors, develops and cultivates commitment and works toward its translation into financial and volunteer support.

Prospect Management

- Manages, plans, develops, implements and evaluates fundraising strategies for a significant pool of assigned major gift prospects; consisting of individuals, alumni, corporations, foundations; may be responsible for prospects in a geographic area.
- Participates in prospect identification, review, research, management, clearance and coordination.
- Ensure that proposals are developed to meet the interests of the prospect and represent all relevant faculties across campus including interdisciplinary and complex projects.
- Ensure that the most appropriate volunteers and faculty-staff are well briefed and involved in the cultivation, solicitation and stewardship of the donors.
- Proficiency in use of technology, specifically fundraising software to ensure detailed notes are recorded for prospect tracking and clearance systems.
- Directs proactive research on individuals identified as having significant donor potential.

Team Leadership & Management

- Provides proactive training, mentorship and management of direct reports, and Math Advancement staff and development of tools and resources for these team members.
- Motivates by providing leadership, priority setting and management direction to direct reports in the Math Advancement office empowering them to strive and achieve agreed upon goals while ensuring that they have the necessary knowledge and tools for success.

Strategic Planning

- Develops and maintains a good working knowledge of the University's activities and the Faculty of Mathematics priority projects.
- Responsible for developing and assisting the Director of Advancement in the Faculty of Mathematics with strategic planning, management and implementation of special projects and annual planning and priorities as assigned.
- Develops annual fundraising strategic plan for the Faculty with some assistance from the Director of Advancement, Faculty of Mathematics.
- Responsible for developing an annual Development business plan and reporting on its progress to the Director at regular intervals.
- Collaborates with the Director of Advancement and Associate Director, Development on business planning.

Stewardship, Donor Relations & Alumni Affairs

- Participates in the identification, recruitment, training, management and stewardship of volunteer teams.
- Develops effective relationships with senior academic administrators, faculty and senior national and international volunteers (identifies, motivates and advises volunteers) as well as representatives of the philanthropic community.

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- Through cultivation and solicitation efforts, establishes and maintains relationships with appropriate senior officers, board members, and donations officers in corporate, foundation, association, and individual sectors.
- Works closely with professional associations in order to further build and strengthen our alumni contacts.
- Working with the Donor Relations Officer the Associate Director of Advancement will oversee the development of stewardship plans, including the appropriate publicity and recognition of gifts, the reporting of monies spent and progress, and the building of long-term relationships.
- Plans and hosts campus visits for major gift donors and prospective donors.
- Working with the Alumni Officer, the Associate Director Advancement provides strategic advice and oversight for the Alumni Affairs activities, including programs and events.
- Engages students before they leave the University of Waterloo; working closely with the Mathematics Undergraduate Society, and the Student Success office to maximize opportunities for relationship building and student engagement.
- Oversee implementation and creation of alumni engagement initiatives.

Communications

- Works with Development Communications Officer to create and implement a communications strategy for the annual fundraising plan including websites, promotional materials, videos, photography, and stewardship pieces.
- In partnership with the Associate Director, Development and the Faculty of Mathematics Communications team develop an integrated communications strategy for the Faculty.

**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 required. CFRE is a strong asset.

Experience

- Recent fundraising experience with extensive experience in annual fund management and securing major gifts; or extensive equivalent education and experience.
- Preference for applicants having previous business-sector and/or high-tech or finance sector experience.
- Must have a successful track record of soliciting and closing major gifts as well as management experience.
- Proven ability to think strategically and work independently in driving new initiatives and enhancing existing programs, and be able to effectively articulate these initiatives.
- A proven track record of success in an outreach capacity including developing and executing strategies, project management, and producing a variety of material.
- A keen awareness and knowledge of relevant individuals in the corporate sector (i.e. high-tech, banking, insurance, finance, investment etc.) related associations, community and government is necessary.
- Proven ability to work collaboratively in a high functioning team within a dynamic environment.

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- Strong understanding of the university environment including the integration of research.
- Experience fundraising in a university environment with an in-depth understanding of the Faculty of Mathematics is a strong asset.
- Established network is an asset.

Knowledge/Skills/Abilities

- Excellent time management skills and demonstrated ability to meet competing deadlines in an organized manner.
- Must have strong leadership, communication (oral and written), presentation, and interpersonal skills; supervisory and mentoring experience is strongly preferred.
- This is a demanding, challenging and exciting role requires a results-oriented and creative individual with demonstrated relationship building skills.
- Intermediate experience with MS Word, Excel and PowerPoint
- Experience with Constituent Management Software such as Raiser's Edge, would be considered an asset.

Nature and Scope

- **Contacts:** Close collaboration and sharing of experience will be expected between colleagues across Advancement and the Faculties. **Significant Internal Relationships:** Dean, Faculty of Mathematics, Director of Advancement, Faculty of Mathematics, Associate Director, Development, Faculty of Mathematics, Faculty and Staff, Faculty of Mathematics, Vice-President, Advancement, Associate Vice-President, Advancement Services, Associate Vice-President, Alumni Relations, Director, Major Gifts, Faculty of Mathematics Advancement Team Executive/Finance Officer(s), Faculty of Mathematics, External Relations, Other Faculty Deans and Associate Deans, Advancement Staff in other Faculties and colleges (FUAC) Annual Fund team, Donor Relations and Stewardship team, Leadership Giving team and Prospect Research team, Office of Research Co-operative Education and Career Services, Student Awards and Financial Aid Office, Graduate Studies Office. **Significant External Relationships:** Prospects and donors for cultivation, solicitation and stewardship purposes. Executives in corporations, associations, community or government organizations. Volunteers associated with UW boards & committees. Alumni research partners and external community representatives.
- **Level of Responsibility:** The job has specialized work with minimal supervision and provides guidance to others. The job includes responsibility for functional direction of members of the Advancement Team.
- **Decision-Making Authority:** Individuals at this level are expected to create complete strategic fundraising plans, work on multiple interdisciplinary projects that may have changing priorities, manage and mentor staff and volunteers, develop annual goals, strategic plans, accept all gift types, manage budgets and plan events and announcements almost autonomously with some direction from supervisor.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment
- **Working Environment: Travel/Working Hours:** Occasional travel (including international travel) and some evening/weekend work is a requirement of this position. **Risks:** Physical - No significant risks except those associated with a business traveler; Psychological risks: No significant risks