

## Job Description

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<b>Job Title:</b>	Associate Vice-President, Engagement
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Vice-President, Advancement
<b>Jobs Reporting:</b>	Senior Director, Alumni Relations, Director, Annual and Planned Giving, Leadership Giving officers
<b>Salary Grade:</b>	USG 19
<b>Effective Date:</b>	November 2022

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### **Primary Purpose**

Reporting to the Vice-President, Advancement, the Associate Vice-President, Engagement will develop and implement alumni and engagement and fundraising strategies to secure annual, leadership, and legacy gifts that support University of Waterloo priorities and values.

As a senior member of the Advancement team, the AVP, Engagement will accommodate additional fundraising activities to better support the advancement work with the faculties. Further the AVP, Engagement, will activate and enhance the university's prospect pipeline by providing leadership in developing and evaluating strategic alumni engagement and fundraising approaches, that best complement and enhance programs within Advancement and across the university.

A primary goal of the AVP, Engagement, is to ensure an integrated approach to broad-based and specialized alumni and giving programs across the university, with a strategic emphasis on building capacity in the pipeline through the engagement, qualification, cultivation, and stewardship of prospects up to a threshold of \$100,000 but normally in the sub \$25,000 range.

This position involves extensive consultation and collaboration with senior leadership across campus (Deans, University College Heads, Faculty Advancement Directors, etc.) development officers, and other stakeholders.

### **Key Accountabilities**

#### **Strategic planning**

- Provides oversight to the development of annual strategic plans across annual, leadership, and planned giving, including projections regarding dollars raised, visits, stewardship activities, and other performance metrics that may be developed
- Maintains an active understanding of the trends and best practices in fundraising and alumni engagement. Liaises regularly with universities to exchange information about best practices, policies, procedures, and system processes.
- Demonstrated ability to develop strategic and tactical plans, establish goals, and accomplish them as part of a university-wide plan. create systems to automate pipeline development and engage unassigned prospects in bulk
- Work with Alumni, Annual Giving, Leadership Giving, and Planned Giving to create a robust pipeline of prospects for both faculty and central partners
- Demonstrated knowledge of annual giving, leadership gifts, and planned giving practices and considerations, including prospect pipeline development, chartable tax considerations, and alumni engagement approaches.

<ul style="list-style-type: none"> <li>Working in collaboration with the other senior leaders, the AVP, Engagement, will play a vital role in providing existing and prospective donors with meaningful opportunities to be connected with and to provide impact to the University of Waterloo.</li> </ul>
<p><b>Program Oversight and Execution</b></p> <ul style="list-style-type: none"> <li>Will plan, implement, manage, and evaluate engagement strategies among alumni and donors with a goal to move them through the fundraising funnel towards the major gift prospect level (\$100,000+), providing lead generation opportunities.</li> <li>Provide executive leadership and be responsible, in collaboration with colleagues, for the overall engagement strategy around alumni as volunteers, champions, and donors utilizing and evaluating the success of up to date and novel strategies as appropriate.</li> <li>Successful creation, execution, and evaluation of high-quality engagement initiatives, both centrally and within the faculties and colleges, to ensure that alumni and donor engagement is broadened, deepened, and aligned with the university's strategic plan.</li> <li>Commitment to long-term donor management in supporting the entire philanthropic life cycle of a donor, working collaboratively on relationships with other Advancement team members as needed.</li> <li>Must be able to negotiate complex donor agreements, acting as a liaison between the university and the donor.</li> <li>Oversees the development and updating of a stewardship matrix to ensure equitable and relevant recognition opportunities for all donors.</li> <li>Ensures robust and effective alumni programming that is relevant to alumni including relationship management, awards, convocations, and reunions.</li> <li>Provide timely updates to Vice-President, Advancement on strategies, annual plans and projections, prospect development, solicitations, and projects under management</li> </ul>
<p><b>Relationship Management</b></p> <ul style="list-style-type: none"> <li>Demonstrated ability to interact comfortably, tactfully, and effectively with a wide range of internal and external constituents and stakeholders, including volunteers, alumni, donors, faculty, and staff.</li> <li>Builds and nurtures relationships with alumni volunteers while supporting the Director, Senior Director, Alumni Relations, in developing effective alumni volunteer programs.</li> <li>Participates in alumni engagement activities while travelling locally, nationally, and occasionally, internationally.</li> <li>Works with Faculty leaders to create custom annual plans for each faculty, focused on pipeline development</li> <li>Will represent the university at events and therefore must be comfortable discussing challenging situations with alumni and donors.</li> <li>Working with the stewardship team, ensures effective stewardship including reporting on gifts, contact strategies, recognition, and appreciation plans.</li> </ul>
<p><b>Leadership</b></p> <ul style="list-style-type: none"> <li>Provides direction to the Senior Director, Alumni Relations and the alumni team to maximize alumni engagement, volunteerism, leadership giving, and stewardship, including collaborative strategies in geographic regions as part their chapter programming.</li> <li>Provides direction to the Leadership Giving team, ensures the strategic development and implementation of this unit, including the development of performance benchmarks that reflect the need to both generate leads and close gifts, transferring prospects and conferring with other stakeholders as appropriate.</li> <li>Provides direction to the Director, Annual &amp; Planned Giving to ensure that appropriate strategies are developed to increase planned giving expectancies and realized estates and to ensure that appropriate strategies are implemented to maintain and grow a broad base of annual giving support.</li> </ul>

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- Proven success in leading and motivating volunteers and donors

*\*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 at minimum. A Master's degree would be considered desirable.
- CFRE designation is preferred.

#### **Experience**

10-15 years of progressive philanthropy and advancement experience with a proven track record of achievement and success within an academic or academic health sciences centre environment is required. Experience working closely with a President, Vice-President, Dean or senior executive leader is required.

- Knowledge of the post-secondary sector and current trends in North American Advancement
- Strategic thinking
- People and relationship management
- Exercises excellent diplomacy and judgment while navigating difficult situations
- Ability to influence key stakeholders
- Superior interpersonal and communication skills
- Presentation and public speaking skills – comfort and ability to adapt speaking style to different sizes and types of audience
- Strong organizational skills

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

<b>MS Word</b>	<b>Excel</b>	<b>PowerPoint/ Presentation software</b>	<b>Social Media</b>
Advanced	Intermediate	Advanced	Advanced

### Nature and Scope

- **Contacts:** The Associate Vice-President, Engagement, interacts regularly with the Vice-President, Advancement. As a key member of the Office of Advancement leadership team, they must have the ability to work collaboratively and effectively with peers. The incumbent works closely with colleagues throughout the institution including: Senior staff, Office of the Vice-President, Advancement Senior staff, Office of Advancement Senior staff, University Relations Senior staff and faculty Development and alumni staff across campus Community Relations and Events Externally, this position will have significant senior contact with donors, natural partners, alumni, and friends, and will be involved in culminating large philanthropic gifts to the university of a highly sensitive, and complex nature that are critical to the organization.
- **Level of Responsibility:** The position is responsible and accountable for the overall results of the unit.
- **Decision-Making Authority:** Responsible and accountable for establishing the priorities for the department and addressing the changes to strategic business plans by consulting directly with the Vice-President, Advancement as appropriate.

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- **Physical and Sensory Demands:** Minimal demands typical of a position operating within an office environment.
  - **Working Environment:** Minimal exposure to disagreeable conditions typical of a senior executive position exposed to stress and pressure associated with senior level responsibilities.