Job Description

Job Title:	Principal Gifts Specialist
Department:	Office of Advancement
Reports To:	Director, Advancement Strategy, Principal Gifts
Jobs Reporting:	Co-op student(s), as approved
Salary Grade:	USG 7
Effective Date:	February 2026

Primary Purpose

Reporting to the Director, Advancement Strategy, Principal Gifts, the Principal Gifts Specialist supports the Vice-President, Advancement & External Relations, the Principal Gifts team, and advancement/campaign leadership by contributing to the development and advancement of principal gift strategies, prospect plans, and campaign-related initiatives. The role strengthens the principal giving function through executive-ready materials, targeted research and analysis, engagement planning and documentation, and disciplined coordination of follow-up and readiness for senior leadership donor/prospect interactions. The incumbent synthesizes information from internal and external sources to inform engagement planning, proposal readiness, and leadership decision-making, and contributes to consistent prospect and engagement information management through the University's CRM. The position may supervise co-op student support.

Key Accountabilities

Prospect Strategy Development and Planning

- Collaborates with Advancement Strategy/Principal Gifts leadership, the Central Development team, and Faculty Advancement teams to support the development of tailored engagement plans for principal gift prospects.
- Prepares background information and participates in planning discussions with relationship managers/primary solicitors to support appropriate engagement activity and timing, aligned to donor stage and institutional priorities.
- Captures and tracks agreed-upon actions from Principal Gifts strategy discussions in engagement plans and the CRM, flagging gaps or lapsed follow-up for attention/escalation as appropriate.
- Maintains a working knowledge of common structures and components of principal and transformational gifts to inform engagement planning and readiness efforts.
- Supports targeted initiatives intended to broaden and strengthen the principal giving pipeline, including activities aligned with university priorities and campaign-related plans.

Executive Briefing and Leadership Engagement Support

- Supports the Director, Advancement Strategy, in preparing the President, Vice-President and advancement leadership for donor/prospect engagement activity by coordinating internal inputs and ensuring materials are complete, accurate, and current.
- Produces and/or coordinates briefing materials and meeting preparation documents (e.g., background summaries, engagement history, relationship context, alignment considerations, and recommended next steps).
- Supports effective post-engagement follow-up by documenting actions, coordinating next steps, and ensuring appropriate internal communication and tracking.

Strategic Research, Analysis, and Context Development

- Conducts targeted research and environmental scans to provide context for principal giving engagement planning, proposal readiness, and senior leadership briefings (e.g., peer approaches, sector activity, institutional comparators, and relevant stakeholder context).

- Synthesizes information from internal partners and public sources into concise, executive-ready materials (e.g., briefing notes, background summaries, issue/context notes, and short analytical memos).
- Develops and maintains reference materials and comparative examples related to principal and transformational philanthropy (e.g., impact models, common gift components, recognition approaches, and illustrative peer examples) to support internal planning and discussion.
- Where prospect-specific information is required, conducts targeted research and synthesis to support customized engagement activities of Waterloo leadership (e.g., the President, Vice-President, and other senior leaders).

Collaboration and Communication

- Supports close collaboration and sharing of knowledge between Central Advancement, Faculties/AFIWs, and other campus units to support coordinated engagement strategies.
- Liaises as needed with internal partners to assemble inputs and ensure alignment for leadership materials, engagement planning, and proposal readiness.
- Maintains effective communication with stakeholders to support timely execution and follow-through on agreed-upon actions and deliverables.

Data and Information Management

- Maintains accurate, current, and appropriately detailed principal gifts prospect and engagement records in the University's CRM, including meeting outcomes, strategy notes, actions, and next steps, in alignment with Advancement standards.
- Maintains tracking tools to support timely follow-through and consistent documentation across Principal Gifts.

Administration & Special Projects

- Responsible for hiring, training, supervision, and evaluation of co-op students and/or casual student staff (as approved).
- At the direction of the Director, Advancement Strategy, Principal Gifts, supports special projects and initiatives that advance the overall mandate of the combined Vice-President Advancement & External Relations and Principal Giving teams.

Required Qualifications

Education

- Completion of a bachelor's degree, or equivalent combination of education and experience
- A graduate degree in a relevant field of study (business, humanities, social sciences) is preferred

Experience

- 3-5 years' progressive experience providing strategy/research support and/or cross-functional executive-level unit support within Advancement, higher education, or a comparable complex organization
- Proven track record of developing briefing and background materials for an executive audience
- Experience in a university advancement setting is preferred

Knowledge/Skills/Abilities

- Superior written and verbal communication skills developed through experience preparing executive-ready materials with a high standard of accuracy and discretion
- Strong organizational and project management skills, with the ability to set priorities and manage multiple deadlines and competing demands
- Demonstrated ability to synthesize complex information into clear, actionable summaries and recommendations for internal audiences
- Strong interpersonal, collaboration and influencing skills, with the ability to work effectively across a complex organization and build productive relationships at all levels

- High ethical standards, sound judgment, and a demonstrated ability to manage confidential and sensitive information
- Strong research aptitude and analytical skills, including experience conducting targeted research and environmental scans and producing concise written outputs; experience using conventional and Generative AI-enabled research methods is preferred
- Comfort working with large datasets and managing information strategically, with strong attention to data quality, documentation, and version control to support sound prioritization and decision-making.
- Technical proficiency in Microsoft Office and comfort working with constituent relationship management systems, with a focus on data accuracy, documentation and reporting

Nature and Scope

- **Contacts:** Communicates regularly with stakeholders within the Office of Advancement (central Advancement, Principal Gifts, campaign colleagues, and faculty-based advancement teams) and occasionally with partners across campus at all levels of the institution; supports interactions involving senior volunteers, donors and prospects as required.
- **Level of Responsibility:** Works under the direction of the Director, Advancement Strategy, Principal Gifts, exercising independent judgment to synthesize information, maintain strategy documentation and planning tools, and coordinate inputs that support principal gift engagement planning and executive readiness.
- **Decision-Making Authority:** The role requires a degree of independence and judgment, particularly as it pertains to information gathering, synthesis, prioritization, and follow-through on agreed-upon actions, which will impact the effectiveness of leadership engagement and the success of principal gift fundraising efforts. The role identifies issues, gaps, and risks requiring escalation and brings them forward to the Director and/or appropriate relationship manager.
- **Physical and Sensory Demands**: Minimal physical demands typical of an office environment and the demands related to occasional travel on and off campus.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of an administrative position; the role requires an ability to work under pressure and respond to changing priorities and time-sensitive deadlines.

**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.*