

Job Description

Job Title:	Director of Development, Major Gifts
Department:	Advancement
Reports To:	Associate Vice-President (AVP) Development Programs
Jobs Reporting:	Associate Director Senior Development Officer Director, External Relations, Library (shared reporting with University Librarian)
Salary Grade:	USG 15
Effective Date:	January 2024

Primary Purpose

Accountable to the AVP Development Programs, the Director is responsible for leading and providing oversight to the major giving unit, driving major gift fundraising and sponsorship activities through the Office of Advancement. The Director works within the framework of Waterloo's Office of Advancement, and the office of the Vice-President Advancement, to ensure that Waterloo has a coordinated overall strategic advancement plan. The Director is also responsible for overseeing academic support unit (ASU) Advancement contributions to and compliance with Waterloo initiatives.

The Director's overall objective is to enhance the fundraising capability and success at the major giving level. through the strategic planning, development and implementation of development programs in support of priority areas. To this end, the Director is accountable for strategic planning of the ASUs Development Activities, including annual fundraising plans, providing team leadership, overseeing major gifts fundraising activity, managing a personal portfolio of major and principal gift prospects and donors, and overseeing the overall Donor strategy development for the portfolio.

The Director, Development provides leadership in developing and evaluating strategic, donor centric fundraising approaches that complement and enhance programs within Advancement and across the university (for example, leadership giving, planned giving, principal gifts, Faculty fundraising campaigns, non-academic support units) as well as advancement service areas (including systems, gift processing, records, donor relations & stewardship, advancement communications and research).

Key Accountabilities

Strategic Direction, Planning and Priority Setting for Major Giving Activity:

- Provides oversight to the development and execution of annual strategic plans across the major giving unit, including projections regarding dollars raised, visits, stewardship activities, and other performance metrics
- Establishes and implements coordinated short and long range goals and objectives for Development activities.
- Establishes internal policies and operating procedures necessary to achieve objectives
- Monitors and evaluates the development program effectiveness against priorities and performance targets; effects changes required for improvement.
- Provides input to capital and other university-wide fundraising campaigns and project themes.
- Ensures ASU/university-wide development programs are in-line with overall university goals and objectives
- Develops and implements fundraising strategies for ASU/university-wide funding priorities in

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consultation with team members and counsel, for example for increasing the average gift, for renewing and upgrading donors and for building the major gifts pipeline.

- Initiates and directs research on individuals identified as having significant donor potential.
- Accountable for the assigned operating budget.

Team Leadership & Management

- Provides direct management, supervisory responsibilities, and establishes priorities for major giving team members as the team grows to meet the needs of the university
- Directs management activities and special projects; Directs recruiting, onboarding, training, and evaluation of program staff and ensures resources are in place for ongoing mentorship and professional development of major giving team members.
- Cultivates a 'One Advancement' team model, encourages collaboration within the team and across Advancement
- Supervises development officers deployed university-wide to support evolving priorities, working collaboratively with leaders in various Faculties or ASUs to support unit fundraising efforts
- Leads the development and implementation of a multi-year plan to build the university's donor pipeline, with particular attention to capacity within the major giving unit, to include goal setting, budgeting, and resource plans in support of overall objectives
- Assists in the development, implementation and evaluation of operating procedures and policies related to the efficient and effective operation of the major giving team with a goal to maximize fundraiser productivity
- Assesses and develops staff potential through assignment of responsibilities and formal training opportunities.

Fundraising and Donor Relations

- Works collaboratively within Advancement to move prospects through the pipeline
- Initiates relationships with potentially generous donors, develops and cultivates commitment and works towards its translation into financial and volunteer support.
- Promotes the needs of the unit at fundraising and other special events through public speaking engagements and personal contact.
- Plans and hosts campus visits for major donors and potential major donors.
- Establishes and monitors donor recognition and acknowledgement programs.
- Develops Terms of Reference for endowment and trust donations
- Assumes primary responsibility for a significant portfolio of major gift prospects and donors. Develops and implements tailored action plans, solicitation strategies and proposals for each prospect. Makes face-to-face calls both with and without key volunteers and University leadership. Prepare notes for prospect tracking and clearance system.
- Works with AVP EDI, AVP Indigenous Initiatives, Vice Provost, Students, Vice Provost CEE, Director, Athletics & Recreation, Director, Velocity, and others across the university to clarify fundraising priorities and develop strategies to cultivate, solicit, support and manage volunteer and donor involvement with Advancement activities.
- Builds/reinforces base & pipeline for major and principal gifts prospects and donors – collaboratively with colleagues across the University in multi-track & PG prospects (clearance, strategy, stewardship).

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Alumni Relations

- Coordinates with Alumni Relations as needed to leverage engagement activity for Development purposes.
- Participates in strategy development and promotion of campus-wide alumni outreach, as required/appropriate.

University Relations

- Develops the infrastructure and linkage to ASUs for fundraising strategies in all priority units.
- Works with Directors, AVPs, and others in advancing individual, corporate and foundation donors in support of their funding priorities.
- Advises Directors, AVPs of established Advancement plans and policies with an aim toward providing consultation for developing appropriate effective programs at the departmental level.
- Plans and develops strategies and advises on pilot projects for Directors, AVPs to test the effectiveness of new strategies and techniques, recommends new programs

**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

- Undergraduate University degree required, Master's degree an asset, preferably from the University of Waterloo
- Certified Fund Raising Executive (CFRE) certification

Experience

- 8+ years of progressively responsible fundraising experience with a proven track record of success, including volunteer management, demonstrated major gift solicitations and campaign experience with a proven track record of achievement and success with raising funds at a level in the top 5% for their sector, with a minimum of \$1M annually for the team they have led, or \$250K individually
- Experience producing strategic plans which consist of measurable objectives and the associated costs
 - Experience monitoring and revising strategic plans
 - Management experience demonstrating the ability to deal with a diversity of Human Resources related issues
 - Experience with complex giving vehicles and planned giving
 - Demonstrated experience using planning/project management tools to manage projects, timelines, and communications
 - Experience dealing with budget-setting
 - Previous experience managing high performing fundraising teams
 - Experience in a university environment is an asset

Knowledge/Skills/Abilities

- A curious nature with strong ability to communicate, keep confidences and use diplomacy
- Fundraising competencies will include: strategic thinking, people management, interpersonal, organizational and communication skills as well as excellent judgment and an ability to develop and nurture key relationships.
- Ability to work under pressure, juggle multiple timelines, negotiate with donors, mediate between and interact with diverse clients and stakeholders both internal and external in peer, junior and senior roles.
- A working knowledge of the university environment is a definite asset.
- Proven skills leading a team of high-functioning, self-motivated professionals
- Demonstrated understanding of not-for-profit climate in North America and internationally

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- Understanding of international alumni programs and fundraising
- Ability to build relationships with Faculty members, staff members, and students
- Understanding and appreciation of the key role of a university education
- History of relationship building with volunteers, prospects and organizational staff
- Creative and effective communication skills (including electronic medium)
- Proven ability to share information and to cooperate with numerous stakeholders
- Sound judgment, tact, diplomacy
- Ability to take initiative where minimal direction is provided
- Willingness to travel internationally
- Intermediate skills in Microsoft Office suite
- Intermediate skills in Fundraising CRM

Nature and Scope

Contacts: Internally, communicates with all faculty and staff in all groups and departments and at all levels to deal with, influence and motivate others, and to promote, justify and settle highly sensitive matters related to implementing development team strategies. Significant External Relationships with prospects and donors for qualification, cultivation, solicitation and stewardship purposes including alumni, parents, friends, Executives in corporations, associations, community or government organizations, Volunteers, Research partners, Co-operative Education partners, External community representatives.

Level of Responsibility: The Director is responsible for advising, supporting and assisting the VP Advancement and AVP Development Programs, ensuring that the University's major giving fundraising goals are met. The Director is responsible and accountable for the overall results of the central major gifts team.

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 prospects and donors and fundraising programs within the major giving portfolios. The Director is responsible and accountable for establishing the priorities for the unit and addressing the changes to strategic business plans by consulting directly with the AVP Development Programs and VP Advancement as appropriate.

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, university vice-presidents, faculty members, deans and senior administration and staff of other university business units. Work outside the normal operating hours of the University can be expected in this role, as can be some travel.