New

PRIMARY PURPOSE:

Reporting to the Vice President, Advancement, the Associate Vice-President (AVP), Development & Alumni Relations is primarily responsible for leading and providing oversight to the Development and Alumni Relations units within the Office of Advancement which is comprised of Alumni Relations; Annual Giving; Leadership Giving;and Planned Giving. As a senior member of the Advancement team, the AVP, Development provides leadership in developing and evaluating strategic alumni engagement and fundraising approaches that complement and enhance programs within Advancement and across the university (for example, principal gifts, Faculty campaigns, etc.), as well as advancement service areas (including systems, gift processing, records,donor relations & stewardship, advancement communications and research).

A primary goal of the Development Team is to ensure an integrated approach to broad-based and specialized giving programs across the university, with a strategic emphasis on building capacity in the “pipeline” through the qualification, cultivation and stewardship of prospects up to a threshold of $100,000. The primary goal of the Alumni Relations team is to inspire and engage life-long relationships with alumni for the purposes of institutional advancement.

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

Description of general framework and environment (content updated below)

In just 60 years, the University of Waterloo, located at the heart of Canada’s Technology Triangle, has become one of Canada’s leading comprehensive universities with 30,000 full- and part-time students in undergraduate and graduate programs. Waterloo, as home to the world’s largest post-secondary co-operative education program, embraces its connections to the world and encourages enterprising partnerships in learning, research and discovery. In the next decade, the university is committed to building a better future for Canada and the world by championing innovation and collaboration to create solutions relevant to the needs of today and tomorrow. For details, visit www.uwaterloo.ca.

The mission of the Office of Advancement is to inspire and engage people in philanthropy to advance the University of Waterloo as one of the world’s top innovation universities. Led by the Vice-President, Advancement, the Office is Advancement is comprised of three central units: Development & Alumni Relations, Principal Gifts, and Advancement Services and decentralized advancement teams in each of its six faculties. Together, the Office of Advancement teams (comprising a staff of approximately 100) seek out opportunities to build support for the university's academic, research, and service goals, and advance the University's Strategic Plan — A Distinguished Past, A Distinctive Future.

Currently, uWaterloo has 183,700 alumni living in 142 countries and is committed to fostering lifelong, mutually-beneficial relationships that preserve and promote uWaterloo’s mission and traditions.

In 2008, uWaterloo moved into the final phase of its transition into an integrated advancement model with a coordinated decentralized advancement structure. In 2010, the University celebrated the completion of Campaign Waterloo: Building a Talent Trust with an incredible $613.2 million raised, making it one of the most successful university campaigns in the country.
For more information about Waterloo Advancement, including a directory of staff, please visit uwwaterloo.ca/support.

**Statistical Data**

The Development & Alumni Relations unit is comprised of 24 full-time staff, 6 faculty based full-time staff who half report, and augmented with 3 co-op students per team and an annual budget in the range of $2.6 million. In addition, the Development unit is the primary relationship manager for a third party partner engaged to manage the university call centre (on-site) and phone program, which employs Waterloo students and operates year-round.

In 2015-16, over 8100 donors made a gift to the University of Waterloo, including almost 5100 alumni donors. There were more than 1500 members of UW’s leadership giving groups as follows:

- Chancellor’s Circle: 329
- Governors’ Circle: 182
- President’s Circle: 813
- Leaders of Tomorrow Circle: 117

There are 467 members of the 1957 Society (lifetime giving of $100K or more from individuals and organizations), many of whom are also current leadership donors.

In the Planned Giving program there are 646 confirmed planned gifts (recognized as Laurel Society members) for an estimated $96 million. Average annual estate income is $1.4 million (based on 10 year average).

**KEY ACCOUNTABILITIES:**

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<th>Establishes the strategic direction, leadership and priority setting for university development activity:</th>
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<td>1.</td>
<td>• provides oversight to the development of annual strategic plans across the development unit, including projections regarding dollars raised, visits, stewardship activities, and other performance metrics that may be developed</td>
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<td>• works closely with Associate Vice-President, Major &amp; Principal Gifts to ensure that programs are properly integrated and strategically aligned</td>
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<td>• ensures strategic alignment and business efficiencies between development unit processes and advancement services. Provides strategic input to advancement services concerning strategic business issues that affect development unit functionality (e.g. prospect clearance, research processes, datamining services, data-hygiene requirements, records processes, etc.)</td>
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<td>• Develops and maintains a good working knowledge of the university’s activities and priority projects</td>
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<th>Responsible for development program implementation and oversight:</th>
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<td>2.</td>
<td>• will develop strategies to encourage broad-based annual giving to the university from multiple constituencies, as well as development of the leadership giving pipeline up to a threshold of $100,000, in a highly collaborative and consultative environment across the campus</td>
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<td>• will ensure that effective and targeted stewardship and donor relations strategies are implemented including the development of event based opportunities and communication techniques</td>
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<td>• will provide oversight of the planned giving program, ensuring that as the university’s constituent base ages, commensurate increases to planned giving expectancies and estate gifts are realized</td>
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<td>• works closely with faculties, colleges, and units/departments in developing strategies, processes, and clearance procedures</td>
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<td>• provides direction to Director, Alumni Relations and alumni team to maximize alumni engagement, volunteerism, leadership giving, stewardship, including collaborative strategies in geographic regions as part their chapter programming</td>
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<td>• provides direction to the Associate Director, Leadership Giving in the strategic development and implementation of this unit, including the development of performance benchmarks</td>
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<td>• provides direction to the Associate Director, Planned Giving to ensure that appropriate strategies are developed to increase planned giving expectancies and realized estates</td>
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<td>• provides direction to the Associate Director, Annual Giving to ensure that appropriate strategies and resources are utilized to maintain and grow a broad base of annual giving support;</td>
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<td>• utilizes tools available including the Raiser’s Edge database to identify and manage prospect relationships</td>
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<td>• provides leadership and sets priorities for the Development Analyst in order to provide more sophisticated donor modelling and analytical tools across the development and alumni relations units</td>
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3. Responsible for developing and directing effective individual and mass alumni strategies to ensure the growth of relationships and communication with all alumni. These strategies require intentional use of alumni volunteers as advisors, mentors and ambassadors, collaboration, coordination, negotiation and consultation within and amongst the university community and the external affinity community. The goal of this activity is to increase communication and connection of alumni to the University of Waterloo, in addition to building capacity for future financial support through philanthropy, sponsorship and partnerships.

4. Establishing and maintaining collaborative relationships:
   - the AVP, Development & Alumni Relations is a position that is centralized within the Office of Advancement and significant strategic leadership and collaboration is required with all faculties and other organizational units on campus in the execution of specialized and interdisciplinary fundraising and stewardship programs including the development of customized strategies and clearance procedures that complement decentralized fundraising strategies.
   - ensures collaboration and transparency for central development unit activities and initiatives so that stakeholders across campus are informed and involved.
   - participates on numerous cross-functional standing committees including: Prospect Management, Directors’ Senior Management Team, Development Team Leads, and the Stewardship Committee.
   - Leads the Development Professionals Group (DPG) meetings for all Development professionals across campus.
   - Assists in the strategy and delivery of All Advancement staff meetings and development staff training sessions.

5. Develops strategies and conducts personal visits to qualify, cultivate, solicit and steward an assigned pool of prospects.

6. Ensures the effective utilization, deployment and development of people and capital resources
   - coaches and provides opportunities for team members
   - participates in the identification, recruitment, training, management and stewardship of volunteers associated with selected special projects.

**POSITION REQUIREMENTS:**

**Education:**
Completion of a Bachelor's degree. Advanced degree in a related discipline preferred.

**Experience:**
10-12 years of progressive experience in Alumni Relations and fundraising with proven track record of achievement and success. Competencies will include strategic thinking, people management, interpersonal, organizational and communication skills.

**Technical:**

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**NATURE AND SCOPE:**

- **Interpersonal Contacts:**

  *Significant Internal Relationships*

- Vice President, Advancement
- Associate Vice President, Major & Principal Gifts
- Associate Vice President, Advancement Services
- Senior administrators (President, Provost)
- Faculty Deans, School Directors, College Heads, Athletics and Library Directors
- Directors of Advancement, Associate Directors, and Development Officers across campus
- Alumni Officers
- Annual Giving team, Office of Development
- Development Analyst
- Associate Director, Stewardship
- Associate Director, Planned Giving
- Graduate and Undergraduate Student Awards Offices
- Prospects and donors for qualification, cultivation, solicitation and stewardship purposes
**Significant External Relationships**
- 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 position is responsible and accountable for the overall results of the group or department.

- **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 President as appropriate.

- **Physical and Sensory Demands:** Minimal demands typical of a senior executive 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.