#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Associate Vice President, Philanthropy & Alumni Engagement

**Job Number:** X-396 | VIP: 1214

**Band:** EXEMPT- 12

**NOC:** 1123

**Department:** External Relations & Advancement

**Supervisor Title:** Vice President, External Relations and Development

**Last Reviewed:**  June 23, 2021

#### **Job Purpose:**

The AVP, Philanthropy & Alumni Engagement leads Trent’s advancement portfolio including fundraising, alumni engagement and services, advancement services, donor and volunteer stewardship, portfolio communications, and events. They are responsible to develop, resource and implement a comprehensive major, transformational and legacy gift fundraising plan, enabled by robust and meaningful donor relationships, communications and stewardship programs, effective alumni engagement strategies, high calibre events; all supported by an effective advancement services operation

Reporting to the Vice-President, External Relations and Development, and as a member of the Trent Senior Management Team, the AVP is a strategic and highly visible leader (within and outside the University). They forge a philanthropic culture, a welcoming environment for alumni, and build personal profile and relationships within and outside the University to attract support for and engagement with the institution. Through raising significant funds and building engagement with alumni, they contribute to the success and sustainability of the University.

#### Key Activities:

**Develop and Implement an Institutional Philanthropic Plan**

* Leads the development, implementation and evaluation of an annual and long term philanthropic plan, including annual, major, transformational and legacy gifts. Conceives of and gains PVP and Board support for major philanthropic campaigns.
* Manages a personal portfolio of transformational and major gifts donors and prospects required to reach annual fundraising goals in excess of $1 million. Proactively secures meetings with prospects to discuss their links, interests, and opportunities to give; develops proposals and financial illustrations for prospects and their advisors; acts as a lead or co-solicitor with volunteers or staff as appropriate.
* Seeks to inspire giving and create a culture of philanthropy within and outside the University.
* Sets, tracks and reports on key performance indicators and fundraising results.
* Ensures a robust moves management approach that includes prospect identification, cultivation, solicitation and stewardship
* Develops structures to engage volunteers. Provides leadership and coaching to the President, VPs, Board members, Philanthropic Advisory Council, volunteers and staff to engage them in fundraising activities.
* Works with the President, VP, PVP and Deans to develop a list of philanthropic priorities around which to build the case for support. Maintains a strong knowledge of the University’s programs, plans and priorities to ensure alignment and to surface emerging opportunities for donor/ prospect engagement and giving.
* Maintains an awareness of other campaigns and how they may impact on Trent’s timing and approach. Develops expertise and understanding of latest trends in campaign structure and best practices; develops strategies to evolve campaign plans in response to results, external and internal forces.

**Ensure effective Advancement Services**

* Ensures a well-resourced and effective Advancement Services operation, information and data management systems to provide reports for all aspects of donor and alumni activity that informs strategic decision making and relationship building.
* Develops appropriate management reports for Campaign team activity and overall Campaign progress. Provides regular reports to the Board of Governors.
* Ensures processes in place to adhere to CRA regulations, privacy legislation, and CASL/ contact permissions
* Ensures the Netcommunities website is being used as a robust tool for donor and alumni engagement

**Promote Donor Communications & Stewardship:**

* Directs development of fundraising and campaign materials, regular production and dissemination of campaign reports, and effective promotion of fundraising priorities to maintain a high profile for philanthropy, to market the campaign, and support gift asks. Oversees the creation of cases for support for the campaign overall, as well as individual fundraising priorities.
* Ensures effective stewardship of donors and volunteers, including reporting on their gifts, contact strategy, recognition, naming, events and appreciation plans. Oversees the development and updating of a stewardship matrix to ensure equitable and relevant recognition opportunities for all donors.
* Ensures appropriate utilization of donated funds to respect designations, maximize disbursements and where necessary, work with donors to increase flexibility of purpose.
* Directs production and distribution of annual reports on our endowment and expendable donor funds to provide accurate and useful information to donors in a timely fashion.

**Advance Alumni Engagement and Services**

* Ensures robust and effective alumni programming that is relevant to alumni no matter which campus, decade, program or college. Activities include relationship management, chapter relations, awards, Homecoming and reunions.
* Builds and nurtures relationship with President of TUAA, and supports Director, Alumni Engagement and Services to develop effective alumni volunteer structures
* Participates in alumni engagement activities locally, nationally and internationally
* Promotes the importance and value of engaging alumni in Trent’s work
* Ensures a successful convocation

**Managerial, Administrative, and Staff Leadership Responsibilities**

* Hire, supervise and develop direct reports including Director Advancement Services, Director Alumni Engagement and Services, and Senior Philanthropic Manager.
* Develops annual budget for portfolio, and attracts the resources necessary to implement plans and achieve goals
* Makes recommendations to VP on changes to portfolio staffing mix in consideration of performance issues, and changing and emerging needs, within budget constraints.
* Sets and monitors high standards for customer service, accuracy and confidentiality.
* Develops, implements and monitors policies, procedures and practices for sponsorship (and related partnerships), gift acceptance, philanthropic naming, and other philanthropically-based issues and opportunities.
* Maintains an active understanding of trends and best practices in fundraising, alumni engagement and donor relations. Liaises regularly with other universities and non-profit sector organizations to exchange information about best practices, policies, procedures and system processes.

#### Education Required:

* Honours University Degree (4 year) required
* CFRE designation an asset.

#### Experience/Qualifications Required:

* Minimum fifteen years’ experience in advancement and related disciplines, including 5+ years in a leadership role.
* Proven track record of campaign management, solicitation of six figure gifts, and donor/ alumni relations. Experience in higher education fundraising desirable.
* Demonstrated knowledge of capital campaigns, major gifts and planned giving practices and considerations, including moves management and prospect pipeline development, endowment funding and charitable tax considerations, and alumni engagement approaches.
* Excellent interpersonal, written and verbal communication skills; strongly persuasive. Able to speak well in one-to-one meetings, at events, and to the media.
* Demonstrated ability to interact comfortably, tactfully, professionally and effectively with a wide range of internal and external constituencies and stakeholders, including volunteers, donors, alumni, faculty and staff, and community members. Collaborative and collegial
* Excellent judgement; diplomatic and tactful. Must manage highly confidential and sensitive information.
* Calm under pressure, able to manage multiple priorities and frequent interruptions and highly stressful situations. Strong conflict resolution skills.
* Demonstrated ability to lead and motivate volunteers and donors; previous experience with senior volunteers and committees is essential.
* Demonstrated ability to develop strategic and tactical plans, establish goals and accomplish them as part of an organizational plan.
* Record of providing leadership, training, and coaching to develop, motivate and retain staff Excellent organizational, planning and time management skills, with demonstrated ability to manage multiple tasks and flexibility in meeting shifting demands and priorities.
* An entrepreneurial spirit and ability to think creatively to solve problems.
* Proficiency with MS Office (Word, Excel, powerpoint), and Raiser’s Edge
* Flexibility to work evenings and weekends on a regular basis.
* Must be willing and able to travel locally, regionally, and occasionally nationally.
* Must have a valid class ‘G’ driver’s licence to meet the travel requirements of the job.

**Job Evaluation Factors:**

**Analytical Reasoning**

Considerable judgement is required to plan and organize the philanthropic efforts of the University, and to develop plans to engage more than 60,000 alumni. There are few reliable road maps for developing the strategy of a fundraising campaign, and many issues will arise that require complex analysis and highly developed reasoning skills. Complex analytical reasoning is applied to almost every area in the scope of this role on almost a daily basis, with few useful insights from past practice and almost no written guidelines or policies to guide approach. Each donor and alum is an absolute individual and approaches that lead to success with one will have little bearing on success with the next.

Examples:

What are appropriate philanthropic goals for the University and what campaign structure and approach will be most successful to achieve these goals? The AVP must consider multiple and changing internal and external factors, such as reputation, competition, internal capacity, leadership etc.

* How to accomplish fundraising goals. Who to approach, what messaging will be most compelling, how to structure a cultivation and engagement plan, what kind of donor recognition might be most compelling, when to announce the campaign, what communication tools will be most effective etc.
* Cultivation and negotiation of complex donor interests and philanthropy: A donor wishes to make a large gift to a certain program. The faculty member responsible for this area may not share the same vision of how this gift could be used. The incumbent needs to navigate and negotiate this potentially difficult situation to align these interests and ensure the gift is made and used as intended
* Develop strategic approaches to engage alumni who may not have been involved with the University since they left

**Decision Making**

Complex decision-making on a daily-basis in all the areas identified under analytical reasoning, with almost no direction from Vice President and little policy to guide decisions that often have no precedents. The AVP works with many stakeholders, including President, Board, Deans and faculty, through a process of consultation and agreement, to decide upon the appropriate course of action, and has significant latitude for decision making on a daily basis. Experience, discretion, tact, and judgment are required. Examples include

* How large a goal to set for fundraising campaigns
* Negotiation and decision-making with volunteers, donors, and stakeholders
* Which funding priority to present to a donor
* How to respond to a donor who is unhappy with how their gift has been utilized
* How to engage an uninterested faculty member to help secure a key gift
* How to address concerns by an alum about a University decision

**Impact**

Actions or decisions taken by the AVP have substantial impact upon the accomplishment of the University’s mission and goals, long term stakeholder relationships, and reputation; and can also has significant negative impact in a number of areas.

* Successful philanthropic plan implementation will generate millions of dollars annually for the University to pursue its mission. This increased support directly impacts upon Trent’s competitive advantage for recruitment (having a wide array of scholarships and bursaries; attractive campus environment; etc), faculty and staff recruitment (funding to recruit Chairs and Professors, departmental funds to achieve goals), morale and reputation
* Reputation/ Negotiating Gift agreements: the individual has regular engagement with and establishes significant agreements with donors of high profile and great influence who, if unhappy or upset, could be very vocal and public about their dissatisfaction.
* Faculty backlash: There are examples at Universities where gift agreements negotiated with donors by the Advancement dept have resulted in a very public backlash by the faculty as being seen to compromise academic integrity (e.g. Manning Institute at Carleton, Balsille School)
* Failure to adhere to CRA regulations could result in revocation of our charitable license and inability to receipt donors – which would severely impact our ability to fundraise resulting in the loss of millions of dollars every year, beyond the reputational impact for the institution
* Designing a developing gift agreements may inadvertently burden the University with unexpected and unfunded costs: for instance, designing and accepting an endowed chair program that fails to consider or cover the costs annual salary increases would place an annual and growing burden on the faculty
* Ineffective or inappropriate stewardship practices or failure to maintain donor confidentiality can result in donor dissatisfaction, can compromise current and future gifts (e.g. cause a multi-million gift to fail), and affect the University’s reputation
* Failure to build positive relationships with alumni can hamper future fundraising

**Responsibility for the Work of Others**

Recruit, orient, train, direct, manage and evaluate the performance of:

* Director Advancement Services, Director Alumni Engagement and Services, Senior Philanthropic Manager, Manager Stewardship, Communications Officer
* Volunteers : ensure appropriate recruitment, orientation and support for fundraising and alumni volunteers

**Communication**

Incumbent must be able to craft, in their own words, in written materials, and through other’s words, a compelling, accurate and often complex philanthropic story to attract donor interest. Must be able to negotiate complex donor agreements, acting as a go-between the University and the donor. Will regularly need to discuss challenging situations with donors, such as the inability to utilise their gift as expected, missed expectations, or departmental or University issues that upset the donor. Will be a spokesperson for the University on fundraising and alumni engagement, including at events and to the media

Internal:

* Regularly engage President, Board of Governors, senior administrators and academic community (deans, chairs, faculty, researchers, staff) to craft philanthropic messages and engage with donors and alumni
* Student leaders: encouraging their participation in joint initiatives, information exchange

External:

* Donors and prospects (corporate, individual, foundations) for the purpose of seeking support for Trent’s priorities (i.e. scholarships, research, etc.). This involves initial communication to successfully obtain a meeting, being able to persuasively present Trent’s interests, to respectfully uncover the donor’s interests, objections and motivations, and to ask for their support. May need to have difficult conversations about how much control can be exerted over the academy/ University to accomplish desired outcomes.
* Alumni – individually and as groups, to encourage them to be involved
* Local groups and organizations (e.g. Women’s Business Network, United Way, etc.)
* Often dealing with confidential information – whether that is a donor who wishes to remain anonymous (failing to meet this can result in great harm to the reputation of the University), or a gift which cannot be announced publicly at that time but multiple people need to be involved in implementing the gift.
* Often dealing with very high profile and important people such as the most senior people in large international organizations (CEOS), high level government officials, community leaders etc
* Responsible for public messaging about the campaign on website, in the press etc.

**Motor/ Sensory Skills**

* Keyboarding & mouse manipulation - Computer usage impacts upon majority of responsibilities
* Driving - To attend meetings and events
* Dexterity/Coordination - Interaction at special events
* Hearing, speech and visual - complex remote and face to face communication, negotiation and presentations

**Effort**

Mental:

* Sustained concentration & focus - Research, strategy development – for content and prospects, proposal writing. Interacting and negotiating with prospects, alumni, volunteers, etc. Prospect identification and qualification.
* Responding to donors requires dedicated attention and responsiveness; often interrupting important work that is deadline driven; sometimes in an emotionally charged environment
* Memory/ recollection - Remembering names, occupations, spouses, children, interests of alumni and donors in order to provide an enriched personal contact

Physical:

* Long periods of time spent keyboarding, in meetings
* Events - Prolonged standing, interaction, logistics and coordination
* Driving - Due to meeting times, travel may be required at exceptionally early or late hours of day, frequently during rush hour traffic. Travel is often stressful due to weather implications such as snow, rain or wind. The hours spent in the car range from 2-5 hours depending on the location and the conditions. These trips often extend outside the normal work day hours

**Working Conditions**

Physical:

* Long periods of time typing
* Long periods of time in meetings with staff, alumni and donors requiring full attention
* Frequent driving and travel requiring more than one hour to attend meetings, at all times of the year and throughout daytime and evening hours. It is not unusual to spend hours travelling in bad weather for one important donor meeting outside business hours.
* Prolonged standing at events to meet and mingle with alumni, donors and volunteers

Psychological:

* Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks; often with little control over schedule due to the need to be entirely driven by the donor and alumni’s willingness to meet and when and where is most convenient for them
* Local, regional and occasional national travel
* Frequently deal with donor and alumni sensitivities and concerns that are not within the control of the AVP
* Significant stress imposed by the need to meet public fundraising gaols, with little ability to control the outcome of donor’s decisions. Years of work go into cultivating donors and there is no guarantee of success
* Scrutiny - Difficult, complex and rapidly changing situations that can have public repercussions if not managed well.
* May put significant effort into arranging meetings with donors and planning travel to be rescheduled or cancelled at the last minute
* Extremely difficult to plan and manage workload and quite dependant upon donors and whether they are willing to meet, frequent changes to schedule, outcomes of meetings, new opportunities with limited deadlines etc