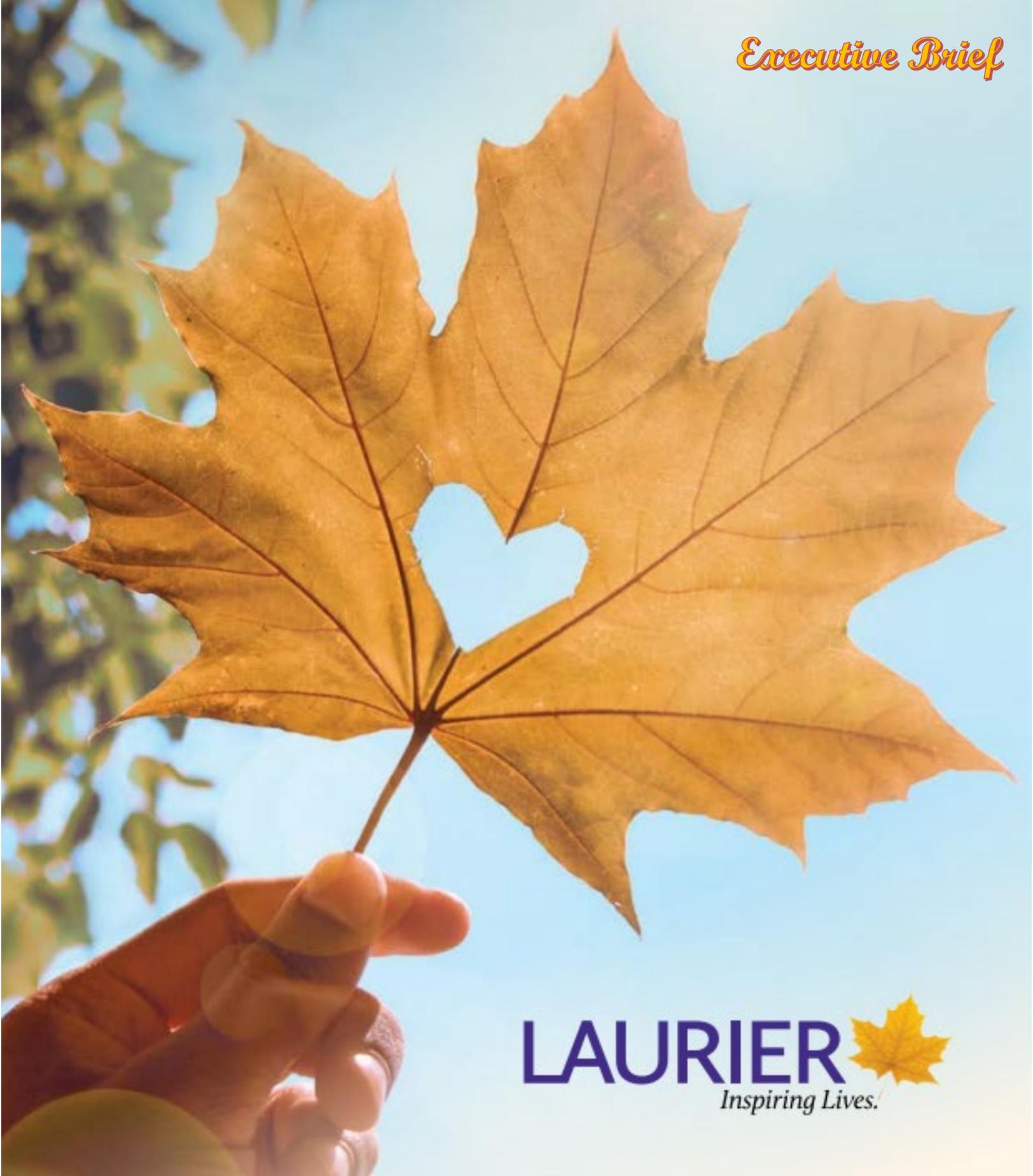


*Executive Brief*



**LAURIER**   
*Inspiring Lives.*



**DIRECTOR, PRINCIPAL & LEGACY GIVING**



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## FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of Wilfrid Laurier University. For more information about this opportunity, please contact Tara George, Partner / Lead, KCI Search + Talent or Sylvie Battisti, Vice President Search + Talent, by email at [WLUlegacygiving@kcitalent.com](mailto:WLUlegacygiving@kcitalent.com).

All inquiries and applications will be held in strict confidence. Interested candidates should send their resume and letter of interest to the email address listed above by **July 11, 2022**.

**Please note that the salary range for this position is \$96,688 – \$151,043, based on experience.** A full suite of employee benefits and perks are also provided.

Diversity and creating a culture of inclusion is a key pillar of Wilfrid Laurier University’s Strategic Academic Plan and is one of Laurier’s core values. Laurier is committed to increasing the diversity of faculty and staff and welcomes applications from candidates who identify as Indigenous, racialized, having disabilities, and from persons of any sexual identities and gender identities. Indigenous candidates who would like to learn more about equity and inclusive programming at Laurier are welcome to contact the Office of Indigenous Initiatives at [mireland@wlu.ca](mailto:mireland@wlu.ca). Candidates from other equity-seeking groups who would like to learn more about equity and inclusive programming at Laurier are welcome to contact Employment Equity & Accessibility at [equity@wlu.ca](mailto:equity@wlu.ca).



## Director, Principal & Legacy Giving

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### THE OPPORTUNITY

*\*Wilfrid Laurier University is also seeking an Associate Director, Development and an Associate Director, Development Milton. For more information, please contact Tara George, Partner at KCI by email at [WLUlegacygiving@kcitalent.com](mailto:WLUlegacygiving@kcitalent.com).*

Reporting to the AVP Development, the Director, Principal & Legacy Giving oversees, develops and implements fundraising and donor relations strategies to secure principal and legacy gifts in support of the priorities and values established through consultation with university leadership. The Director of Principal and Legacy Giving is responsible for the day-to-day operations of coordinating the relationship management strategies for all principal gifts donors and prospects capable of making the largest gifts. These gifts are typically in the \$250K to \$1M+. The incumbent will lead and provide direct and functional management for the principal and legacy giving program, working with colleagues in the Development Team, direct reports, collaborative partners and leadership from across the university to grow philanthropic strategy, competency and principal giving capacity.

The Director will act as strategic support and lead partner in the management and advancement of all principal giving level donors for the university. The successful candidate will work with an individual list of approximately 15-20 assigned principal giving prospects to secure gifts and pledges of between \$250,000 to more than \$1M from individuals, corporations and foundations. The Director will provide strategic management and support for the Legacy Giving Program at Laurier.

The incumbent will provide leadership in a multi-campus environment, requiring regular interaction, communication and collaboration with external partners and internal stakeholders at the Waterloo and Brantford campuses. The Director will ensure that institution policies, programs and services are delivered equitably across all campuses and reflect the needs of local stakeholders. As a key member of the Development team at Laurier, the Director, Principal and Legacy Giving participates in university-wide strategy, planning and initiatives, which will enhance fundraising activities, specifically at the principal giving level and will play an advising and strategic thought partnership role, working with fundraisers as part of a team developing and advancing strategies. This position has a university-wide mandate.

**The position is based at Laurier's Waterloo Campus with the option for partial or fully remote work for those located in Ontario. Periodic visits to Laurier's Campuses will be expected for those working remotely.**

## ABOUT WILFRID LAURIER UNIVERSITY

Wilfrid Laurier University is a leading Canadian university that excels at inspiring lives of leadership and purpose. Its holistic approach to learning integrates innovative programming with hands-on experience outside the classroom. Students gain both the knowledge and skills needed to succeed and the inspiration to make their mark.

From day one, students feel welcomed and find their place in the many faculties, clubs, teams, and associations Laurier has to offer. Students build supportive and collaborative relationships with faculty and staff, as well as lasting connections to the communities in which they live, learn and work. Life-changing international exchanges help students establish their place in the global community, and thousands of engaged alumni carry the Laurier legacy throughout the world.

Through its community of researchers, leaders and educators, Laurier has built a reputation as a world-class institution known for its academic excellence and global impact. In acknowledgement of its exemplary workplace policies and programs, and its commitment to sustainability and lifelong learning, Laurier was named one of the Waterloo Area's Top Employers in 2019, 2020, and 2021.

Laurier specializes in arts and social sciences, business and economics, music, science, social work, education, and theology. The university has 20,000 students, campuses in Waterloo and Brantford, locations in Kitchener and Toronto, and a research office in Yellowknife. Laurier was established as the Evangelical Lutheran Seminary of Canada in 1911 and remains the home of the federated Martin Luther University College (formerly Waterloo Lutheran Seminary).

Laurier is committed to partnerships and collaborations aligned with our academic priorities. Laurier's research community consists of more than 500 researchers in eight disciplinary faculties forming a highly interactive and interdisciplinary academic community. The university supports more than 20 research centres and institutes that stimulate innovation, attract research funding, and enhance the experience of faculty, students, postdoctoral fellows and visiting scholars.

Laurier's strategic themes of Thriving Community and Future Readiness are outlined in the [Laurier Strategy: 2019-2024 – Today. Tomorrow. Together.](#)

## ADDITIONAL INFORMATION

### About Us:

- [Discover Laurier](#)
- [Laurier Fact Sheet](#)
- [Quick Facts about Laurier](#)

### Strategic Roadmaps:

- [Laurier Strategy 2019 - 2024](#)
- [Action Plan for Equity, Diversity, Inclusion, and Indigeneity](#)
- [Strategic Mandate Agreement](#)
- [Strategic Academic Plan](#)
- [Strategic Research Plan](#)

## Leadership:

- [University Board of Governors](#)
- [University Senate](#)
- [University Senior Leadership](#)
- [WLU Alumni Association – Board of Directors](#)
- [Wilfrid Laurier University Student Alumni Association](#)

## Advancement and External Relations:

- [Giving to Laurier](#)

## Land Acknowledgement

Kitchener, Waterloo, Cambridge and Brantford are on the traditional territory of the Neutral, Anishnawbe and Haudenosaunee peoples.

Wilfrid Laurier University's Waterloo and Brantford campuses are both located on the Haldimand Tract, which, on October 25, 1784, after the American Revolutionary War of Independence, was given to the Six Nations of the Grand River by the British as compensation for their role in the war and for the loss of their traditional lands in Upstate New York. Of the 950,000 acres given to the Haudenosaunee (six miles on either side of the Grand River, all the way along its length), only 46,000 acres (less than 5 percent) remains Six Nations land.

## KEY DUTIES & RESPONSIBILITIES

### Principal Gift Fundraising and Prospect Management

- Develops and grows the Principal Giving prospect pipeline as a sustainable source of philanthropic support.
- Collaborates with colleagues within the Development Team to serve as a thought partner to curate strategies to engage high-net-worth philanthropists that will lead to the development of strong and lasting relationships.
- Provides leadership, oversight, guidance and strategic counsel specific to the university-wide principal giving program that includes the top 100 prospects and donors for Laurier.
- Acts as a central liaison for executive and volunteer leadership specific to an interface with principal gift donors and prospects. Prioritizes activity and relationships to align with University Strategic Priorities while ensuring a donor-centred approach that maximizes impact.
- Develops and manages an assigned list of 15-20 principal giving prospects and donors that include individuals, foundations, corporations and associations, for the purpose of securing financial support.
- Meets or exceeds annual personal revenue goals and staff activity metrics.
- Prepares executive leadership for success by coordinating prospect/donor calls, executive briefings, and donor meetings and ensures all necessary follow-up including correspondence to donors, contact reports, updates to BANNER, and drafting of terms and conditions for gift agreements are complete.

- Develops, submits, and follows up on funding proposals to prospective donors.
- Develops and reports on strategic plans and other collateral materials to deepen the prospect engagement.
- Develops and reports on key metrics, indicators, and predictive models to direct internal stakeholders on how to maximize ROI and make corrective in-progress recommendations on plans.
- Develops and implements, in concert with the Manager – Stewardship & Donor Relations strategy for principal giving level donors, including gift announcements, donor cultivation/recognition events, and reports to donors on progress and outcomes of fundraising projects with a view to strengthening those relationships.

### **Legacy Gift Program Management**

- Provide leadership, oversight, guidance, and strategic counsel specific to the legacy giving program to develop a collective professional practice of strategic philanthropy that leverages the procurement of non-cash assets and documented gift intentions to elevate philanthropic investment at Laurier, while stewarding valuable long-term relationships.
- Support the Development Officer-Individual and Legacy Giving to continue to develop a pipeline of legacy gifts and membership within the William Ross Macdonald Legacy Council including the tracking, monitoring, and reporting of metrics.
- Champion and support the Development Officer-Individual and Legacy Giving in the collaborative development of a multi-year and multi-channel comprehensive program to support the marketing of legacy giving at Laurier that activates resources from both Development and Alumni Relations.
- Works collaboratively with the Development Officer – Individual and Legacy Giving to develop and expand existing relationships with professional advisors and related associations to raise awareness of legacy giving at Laurier.
- Ensures the team remains current on changes to income, estate, and gift tax-related rules, regulations, and trends.

### **University-Wide Fundraising, Planning, Strategy Development & Reporting**

- Participates in revenue projections and forecasting through fundraising activity to satisfy KPI's in the Development Plan.
- Engages in Case Design process to ensure alignment with donor interest and scope.
- Provides practical advice on fundraising success probabilities for projects and appeals to external funders.
- Develop briefing materials and conduct briefings for Senior Leadership, Volunteers and other key stakeholders in principal gift solicitations and legacy commitments and/or current gifts of complex assets.
- Maintains a good working knowledge of the activities, priorities and needs in teaching, research, programs, capital, and other areas of Laurier.
- Reports bi-weekly to the AVP, Development on all principal giving and legacy giving and donor relations initiatives.
- Recommends specific actions to increase the effectiveness of development activities including own performance.
- Engages and assists Senior Leadership and Volunteers in fundraising and donor relations activities on behalf of the University.

- Develops and implements plans for fundraising activities which support the priorities of the University, including specific measurable goals for visits and solicitations.
- Develops reports on fundraising progress.
- Meets regularly with the Development team to review principal gift progress and plans, develop strategy and ensure goals are achieved.
- Participates in DAC meetings as needed and other relevant bodies by reporting regularly on development activities.
- Works collaboratively within the Development team to ensure prospect identification and relationship building occurs specific to principal and legacy giving.
- Maintains collaborative and productive working relationships with peers within the External Relations team including Alumni Relations, Advancement Services, Government Relations, Communications and Marketing, etc.
- Maintains a high degree of sensitivity to the specific needs, values and culture of the University and engages faculty members as appropriate.

### **External Communications**

- Collaborates with other External Relations and Advancement staff to prepare and coordinate all communications pertaining to fundraising and donor relations.
- Prepares and edits relevant communication materials, such as project descriptions, case statements, funding proposals, and gift agreements.
- Assists and advises the AVP of Development on specific fundraising initiatives and strategies.

### **Volunteer Management, Faculty Liaison and Administration**

- Identifies, recruits, orientates and manages volunteers to assist in fundraising activities as appropriate.
- In consultation with other colleagues, ensures the effective and efficient use of centralized resources and information.
- Contributes to the preparation and management of the annual budget for Development and Alumni Relations.
- Assists in the management of the daily activities of the Development Coordinator.

### **Leadership**

- Works closely with AVP of Development, VP of Advancement & External Relations, and Executive Leadership to establish annual and multi-year fundraising priorities and goals for Development.
- Leads the principal and legacy giving programs and oversees direct reports in executing specific fundraising activities to meet fundraising goals.
- Oversees the development and implementation of customized strategies and individualized strategic approaches to engage the interest and philanthropic investment (principal gifts \$1M+ and legacy gifts) of individuals, corporations, and foundations in support of strategic priorities across the University.
- Develops and manages timelines for various fundraising activities to ensure strategic plans and critical fundraising processes are carried out in a timely manner.
- Manages the Development team's work with Executive and Academic Leadership.

- Monitors and evaluates principal and legacy giving fundraising activities to ensure that fundraising goals are being achieved.
- Coaches Development team and collaborative partners as needed to strengthen strategies to ensure success.
- Influence and motivate others by building relationships and directing work as a liaison between groups with a focus on solving unstructured problems.

## QUALIFICATIONS & COMPETENCIES

- University degree; CFRE preferred; MFA-P preferred.
- A strong interest and recognition in the value of post-secondary education and continuous learning.
- Established leader who has had progressively senior roles, with 7-10 years of higher education experience providing leadership in development and fundraising.
- Proven experience in prospect development, management, solicitation and stewardship of principal gifts at the \$1M+ level. Capital Campaign experience preferred.
- Experience and demonstrated success in prospect identification, relationship building, strategizing and solicitation of legacy gifts, with particular emphasis on gift planning.
- Experience in working with high-net-worth individuals in private banking, financial services, financial planning or philanthropy.
- Knowledge of Canadian fundraising, gift vehicles, best practices, legislation, tax implications and restrictions.
- Demonstrated understanding of how major and legacy giving activities relate and connect to other areas within development such as events, stewardship, research, annual giving, direct marketing, government and community relations with the demonstrated ability to move easily between principal, major and legacy giving.
- Strategic thinker and established fundraiser who likes a challenge identifies prospects and looks for opportunities to work with others and build relationships that achieve measurable results.
- Demonstrated experience and political acumen to navigate multi-stakeholder relationships and complex systems. A sophisticated understanding of university culture and the various regulations pertaining to fundraising.
- Evidenced ability to problem solve imaginatively and creatively. Demonstrated leadership and team-building skills including experience in goal setting, motivating, leading, supervising, evaluating, and developing a capable team of professionals.
- Exceptional verbal and written communication skills, especially with senior officials.
- Appreciation of diverse perspectives and ability to work with diverse groups including members of the media, senior administration, faculty, members of student government, staff and students.

## WILFRID LAURIER UNIVERSITY – CAMPUS LOCATIONS

### Kitchener-Waterloo

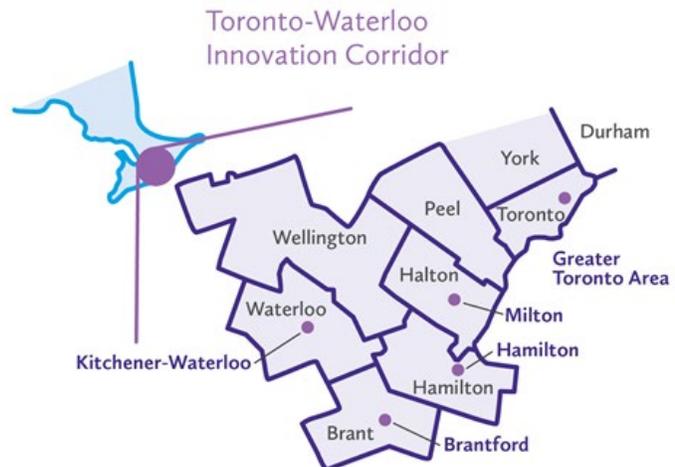
The Waterloo Region, consisting of the cities of Kitchener, Waterloo and Cambridge, as well as the townships of North Dumfries, Wellesley, Wilmot and Woolwich, is home to Canada's fastest-growing technology sector and is part of the Toronto-Waterloo Innovation Corridor. Located approximately one hour west of Toronto, the Waterloo Region offers a unique blend of modern, energetic urban centres and scenic, rural landscapes, and is easily accessible by road, rail and air.

The community has a reputation for innovation, where a new generation of entrepreneurs is ready to invent the future. Communitech, an internationally recognized, industry-led innovation centre, calls Waterloo home, as do tech companies like Desire2Learn, OpenText, Shopify, Google, Oracle, Vidyard and Igloo. Some of the country's largest insurance and financial companies have **their Canadian headquarters here, including Sun Life Financial, Manulife Financial, and Economical Insurance**

One of Canada's fastest growing communities expected to grow **33%** by 2031.

**5,200+** tech startups and **15,000+** tech companies.

Waterloo Economic Development Corporation 2018



Kitchener-Waterloo is located on the Haldimand Tract, the traditional territory of the Neutral, Anishnaabe and Haudenosaunee peoples. Today the Haldimand Tract is home to a diverse group of Indigenous people, as well as the Anishnaabe and the Haudenosaunee.

Waterloo Region is renowned for higher education and research. In addition to Laurier, it is home to the University of Waterloo and Conestoga College. Internationally recognized research organizations also make their home in Waterloo: the Perimeter Institute for Theoretical Physics, the Institute for Quantum Computing, the Balsillie School for International Affairs and the Centre for International Governance Innovation.

Kitchener and Waterloo have vibrant cultural scenes and host many major events throughout the year. Their historic German roots are celebrated on a grand scale during Oktoberfest, the largest Bavarian festival outside of Munich, Germany. Farm-fresh food is never hard to find at the region's two popular farmers' markets: the Kitchener Market and the famous St Jacobs Farmers' Market. Waterloo Region offers more than 150 kilometres of community trails that are ideal for walking, jogging, cycling and bird watching.

## Waterloo Campus

Nestled around one city block, Laurier's [Waterloo campus](#) is home to more than 15,500 students in undergraduate and graduate studies. Known for its small community feel, the campus is a welcoming environment for students and staff. Laurier is a [leading force in research](#) among Canadian universities, and many of its [research centres and institutes](#) are housed here. The newest building on the Waterloo campus is the [LEED Gold-certified](#) Lazaridis Hall, home of Laurier's prestigious [Lazaridis School of Business and Economics](#). Many of Laurier's varsity athletics are based in Waterloo, including the Golden Hawks football team, and students develop deep local connections through Laurier's [community service-learning program and workplace partnerships](#) with the Waterloo Region's top employers. The groundbreaking in April 2022 for the Faculty of Music's new Savvas Chamberlain Music Building will create an exceptional new campus entranceway, as well as lobby and practice rooms that will allow increased opportunities for music students to develop their craft and for the public to enjoy and participate in Faculty of Music programming.

## Brantford

Situated on the picturesque Grand River, the City of Brantford is in the heart of Southern Ontario, with direct access to Highway 403 and proximity to other major highways, rail lines and three Canadian

**200+**  
number of **community partnerships** between Laurier and Brantford **businesses and organizations.**



Brantford is just over an hour from Toronto and Niagara Falls, and **public transit makes it easy to get around.**



ports of entry (Windsor, Toronto, and Niagara Falls/Fort Erie). Brantford is named after Joseph Brant – also known as Thayendanegea – an important Mohawk chief during the American Revolutionary War and, later, an influential Indigenous leader and intermediary between Indigenous and non-Indigenous communities. Neighbouring Brantford are the Indigenous communities of Six Nations of the Grand River Territory — the most populous Indigenous community in Canada — and the Mississaugas of the Credit First Nation.

Brantford is known as The Telephone City in recognition of its affiliation with telephone inventor Alexander Graham Bell, who made significant developments in early telephone technology at his parents' home in Brantford. In 1876 he conducted the first successful attempt to

transmit speech over a telegraph line, between Brantford and Paris, Ontario.

Brantford is also the hometown of hockey legend Wayne Gretzky. The city has a strong sporting legacy, supporting a wide range of physical activities and hosting numerous youth and adult tournaments throughout the year, earning it the nickname of "Tournament Capital of Ontario."

After a long history as a successful farming and manufacturing centre, Brantford endured a period of economic hardship in the 1980s and 1990s. The community's fortunes began to recover in the late 1990s, thanks in part to the establishment of a Laurier campus in the downtown in 1999.

Brantford has cultivated a diverse economic base that is home to many companies operating in the global marketplace, including SC Johnson, Ferrero Canada Ltd./Ltée, Mitsui High-tec (Canada) Inc., Procter & Gamble, Tigercat Industries Inc. and Maple Leaf Foods. Complementing this wide-ranging industrial base, the city has also seen significant recent interest in developing the film and digital media sector, reflecting the city's unique natural features, historical buildings, beautiful neighbourhoods and public amenities.

As a thriving city that is rich in culture and tourism attractions, Brantford has something to offer everyone – historical experiences, outdoor adventure, fantastic family fun, sporting events and culinary destinations. The city's location provides easy access to major highways, internationally connected railways and airports, as well as GO Transit bus service.



### **Brantford campus**

Integration is a hallmark of the [Brantford campus](#). Laurier Brantford is home to a vibrant student community of approximately 3,000 undergraduate and graduate students. With its 20-plus buildings spread throughout the core of the city, the Brantford campus is literally interwoven into the community. Laurier has repurposed a bank, post office and movie theatre into student-centric areas for living, learning and recreation. Through programs like CityStudio, Community Service-Learning, co-op and more, students have a chance to build bridges between the university and the city, all while gaining valuable experience, building networks and contributing in meaningful ways.

### **Milton**

Wilfrid Laurier University will have another community to call home following provincial approval to establish a new university campus in Milton. The Government of Ontario announced it in June 2021 for Laurier to develop this milestone project in collaboration with the Town of Milton and Conestoga College. The campus, which is a key element of Laurier's strategic multi-campus growth, will focus on planetary health and offer programming, research and experiential learning in STEAM (science, technology, engineering, arts and mathematics) fields.

Laurier's campus will be situated on approximately 103 acres of land – 33 acres of developable land and 70 acres of undeveloped greenbelt land – donated to the university by the Town of Milton. The campus will scale to approximately 2,500 students in the first decade, with Laurier's first building anticipated to open in 2024.

**To find out more about these beautiful cities, we recommend the following websites:** [Kitchener](#), [Waterloo](#), [Brantford](#), and [Milton](#)

## LEADERSHIP BIOGRAPHY

### **Deborah MacLatchy**

President and Vice-Chancellor

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Deborah MacLatchy began her five-year term as president and vice-chancellor of Wilfrid Laurier University on July 1, 2017. In this role, she is responsible for the strategic direction of the university, as well as for the academic and administrative operations. She is accountable to Laurier's Board of Governors.

A distinguished biologist with extensive experience in research, teaching, and administration, MacLatchy served as dean of Laurier's Faculty of Science from 2007 to 2009 and as provost and vice-president: academic from 2009 until 2017. Previously, MacLatchy spent 13 years at the University of New Brunswick where she was dean of Science, Applied Science and Engineering, and director of the university's International Office.



MacLatchy holds an honours BSc from Acadia University and a PhD in zoology from the University of Manitoba. She is a founding fellow and past chair of the science directors of the Canadian Rivers Institute and is a past president and council member of the Canadian Society of Zoologists.

She has been recognized for her many achievements with a number of significant awards, including an honorary doctorate from Acadia University in 2016 and the 2015 Recognition Award from the Senior Women Academic Administrators of Canada. As well, she was named one of Canada's Most Powerful Women for 2012 in a Top 100 list compiled by the Women's Executive Network.

## **Jason Coolman**

Vice-President: Advancement and External Relations

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Jason Coolman leads the university's advancement and external relations initiatives, furthering Laurier's efforts as a multi-campus university with deep community connections. He provides direction and support for Laurier's overall donor and alumni relations, communications, marketing and government relations strategies.

Before joining the Laurier executive leadership team in 2019, Coolman served as the associate vice-president: development and alumni relations at the University of Waterloo.

He is an active member of the Council for Advancement and Support of Education (CASE), serving as treasurer for the District II Board of Directors.



## WILFRID LAURIER UNIVERSITY ORGANIZATIONAL CHART

