



Inspiring careers.

Executive Brief

Wilfrid Laurier University

In the recruitment of the

Director, Development
Lazaridis School of
Business & Economics



Table of Contents

The Opportunity	2
Key Responsibilities	2
Experiences & Competencies	5
Organization Profile	6
About Laurier's Campuses and Locations	8
Wilfrid Laurier University: Links & Additional Information	11
Leadership Biographies.....	12
Organizational Chart	13

Application Process & Deadline

KCI (Ketchum Canada Inc.) has been retained to conduct this executive search on behalf of Wilfrid Laurier University. For further information about this leadership opportunity, please contact Tara George, Partner / Lead, KCI Search + Talent, by email at Lazaridis@kcitalent.com.

Interested candidates are invited to send resume and letter of interest to the above email address by **May 11, 2020**

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 welcomed to contact the Office of Indigenous Initiatives at mireland@wlu.ca. Candidates from other equity seeking groups who would like to learn more about equity and inclusive programming at Laurier are welcomed to contact Employment Equity & Accessibility at equity@wlu.ca.

We have strived to make our application process accessible however if you require any assistance applying for a position or would like this job posting in an alternative format, please contact Human Resources at 519-884-1970 ext.2007 or hr@wlu.ca.

Members of the above designated groups must self-identify to be considered for employment equity. Candidates may self-identify, in confidence, by filling out a Self-Identification Questionnaire, which will be provided by KCI to all applicants.

The Opportunity

Laurier's Lazaridis School of Business & Economics (Lazaridis) is one of Canada's most selective and prestigious business programs. With more than 32,000 alumni, 160 full-time faculty and 6,000 students, the Lazaridis School is one of the largest business schools in Canada. The mission of Lazaridis is to develop leaders with the skills in management and economics for a rapidly changing and complex global environment. We seek to advance knowledge and practices in these fields by supporting both theoretical and applied research. Furthermore, we strive to serve business and our community by fostering mutually beneficial alliances with leaders at local, national and international levels. The Lazaridis Director of Development works closely with the Dean to uphold the Lazaridis mission and to support the work of one of Canada's largest business schools.

Located within one of the most vibrant start-up communities in Canada, the Director and their team will be based on Laurier's Waterloo campus with travel required to the university's campus in Brantford, which is home to our Business Technology Management bachelor's program, to downtown Toronto – the location of our Toronto MBA and Master of Finance programs and to the Lazaridis Institute for the Management of Technology Enterprises' Executive Development Centre in Kitchener.

Reporting to the AVP Development with accountabilities to and direction from the Dean of the Lazaridis School of Business & Economics, the Lazaridis Director of Development develops and implements major gifts and donor relations strategies in support of the priorities and values of Lazaridis established by the Dean of the Lazaridis School in collaboration with University Development. They will lead and manage the Lazaridis development team, made up of a Development Officer and Development Coordinator, in executing on the vision of the Dean and AVP of Development to meet fundraising goals.

The incumbent will manage and advance an assigned list of approximately 50 - 100 major gift donors and prospects to secure gifts and pledges of between \$25,000 to more than \$1 million from individuals, corporations and foundations in support of the Lazaridis School of Business & Economics. This position has a Faculty-specific mandate and is based at the Waterloo Campus. The incumbent provides leadership in a multi-campus environment, requiring regular interaction, communication and collaboration with staff and stakeholders at the Waterloo Campus, Brantford Campus, the Lazaridis Institute's Kitchener office and external partners. The Director will ensure the unit's 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 participates in Faculty -wide planning and initiatives which enhance fundraising.

Key Responsibilities

Major Gift Fundraising and Prospect Management

- Manages an assigned list of major gift donors and prospects representing individuals, foundations, corporations and associations for the purpose of securing financial support;
- With the Lazaridis development team, develops and implements strategies for identification, cultivation, and solicitation of prospects to achieve financial targets;

- Coordinates prospect/donor calls, makes visits and ensures all necessary follow-up including correspondence to donors, contact reports, updates to Banner, and drafting of terms and conditions;
- Develops, submits and follows up on funding proposals to prospective donors;
- Develops and implements, in concert with the Donor Relations Officer, stewardship strategy for individual donors, including gift announcements, donor cultivation/recognition events, and reports to donors on progress and outcomes of fundraising projects they have supported with a view to strengthening those relationships.

Faculty Specific Fundraising, Planning, Strategy Development and Reporting:

- Advances the Lazaridis School of Business & Economics' involvement in the overall Development program; collaborates with Faculty resources in fulfilling the plan;
- Participates in revenue projections and forecasting through fundraising activity to satisfy KPI's in the Development Plan;
- Provides practical advice on fundraising success probabilities for projects and appeal to external funders;
- Maintains a good working knowledge of the activities, priorities and needs in teaching, research and other areas of Lazaridis;
- Reports bi-weekly to the AVP, Development, and at minimum, on a monthly basis to the Dean of Lazaridis on all fundraising and donor relations initiatives;
- Recommends specific actions to increase the effectiveness of development activities including own performance;
- Engages and assists the Dean of Lazaridis and individual faculty members in fundraising and donor relations activities on behalf of the unit;
- Develops and implements plans for fundraising activities which support the priorities of the units, including specific measureable goals for visits and solicitations;
- Develops reports on fundraising progress;
- Meets regularly with the Lazaridis Development team to review progress and plans, develop strategy and ensure goals are achieved;
- Participates in Dean's Advisory board meetings and other relevant bodies by reporting regularly on development activities;
- Works collaboratively with peers within the Development team, specifically Directors of Development and the AVP Development; to ensure prospect identification and relationship building occurs;
- 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 Lazaridis School of Business & Economics and engages faculty members as appropriate.

External Communication:

- Collaborates with other Advancement staff to prepare and coordinate all communication pertaining to fundraising and donor relations within the units;
- Prepares and edits relevant communications 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 and manages volunteers to assist in fundraising activities as appropriate;
- Provides direction and advice to student fundraising initiatives;
- 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;
- 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 Dean of Lazaridis to establish annual and multi-year fundraising goals for Lazaridis campaign goals;
- Leads the Lazaridis Development team and oversees direct reports: Development Officer, and Development Coordinator in executing specific fundraising activities to meet Lazaridis fundraising goals;
- Oversees the development and implementation of customized strategies and individualized strategic approaches to engage the interest and philanthropic investment (of major gifts \$250,000 and up) of individuals (alumni and friends) corporations, and foundations, in support of priorities of Lazaridis;
- Develops and manages timelines for various fundraising activities to ensure strategic plans and critical fund raising processes are carried out in a timely manner;
- Manages the Lazaridis team's work with senior administrators, faculty or volunteers;
- Monitors and evaluates Lazaridis fundraising activities to ensure that the fundraising goals are being achieved;
- Coaches Lazaridis Development team as needed to strengthen strategies to ensure success.

Experience & Competencies

- Minimum Bachelor's degree.
- Established leader with at least 5 - 7 years related experience providing leadership in development and fundraising.
- Progressive and proven experience in a major gift fundraising and donor relations function, Capital Campaign experience preferred.
- Strong experience closing at the \$25,000 level and experience or exposure with engaging and closing gifts over \$1,000,000.
- A strong interest and recognition in value of the post-secondary education and continuous learning.
- An understanding of how to partner with subject matter experts to promote an engagement and investment the university culture and the various regulations pertaining to fundraising.
- Proven ability to foster relationships with internal and external stakeholders and create effective partnerships to advance the University's mission and vision.
- Ability to engage people, inside and outside of the University, working collaboratively, effectively and successfully to advance Laurier's philanthropic efforts.
- 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 communications 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.



Organization Profile

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.

Laurier has been ranked #1 in student satisfaction for the past four years, thanks in no small part to its unique community-centered culture. 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.

Laurier ranked #1 for:

- ◆ *Student satisfaction (Maclean's University Rankings, 2020)*
- ◆ *Research growth (Top 50 Research University Ranking, Research Infosource, 2017)*
- ◆ *Sustainability (Corporate Knights Greenest Campuses Index 2017)*
- ◆ *Course instructors (Maclean's University Rankings, 2020)*
- ◆ *Administrative staff (Maclean's University Rankings, 2020)*

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.

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 is also a leader in integrated and engaged learning, which connects academic programming and co-curricular activities. An example of this experiential approach is our highly regarded co-operative education program, which offers options in Arts, Business and Science, and is the largest business co-op program in Canada.

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

For more information on Wilfrid Laurier University, please visit:

- ♦ [Wilfrid Laurier University](#)





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.

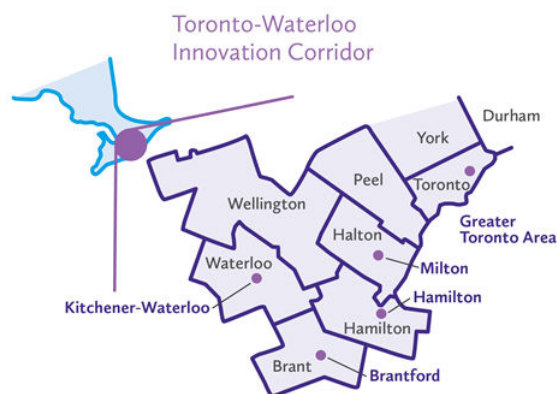
The community has a reputation for innovation, where a new generation of entrepreneurs is ready to invent the future. Communitech, an internationally recognized, industry-led innovation centre, calls Waterloo home, as do tech companies like Desire2Learn, OpenText, Shopify, Google, Oracle, Vidyard and 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.

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.

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



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.

150+ research institutes, incubators, hubs and accelerator programs - Waterloo EDC

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 kilometers of community trails that are ideal for walking, jogging, cycling and bird watching.

The Waterloo campus is home to:
 Faculty of Arts
 Faculty of Education
 Faculty of Graduate and Postdoctoral Studies
 Faculty of Music
 Faculty of Science
 Lazaridis School of Business and Economics

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.

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 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.

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.**



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.



The Brantford campus is home to:
Faculty of Liberal Arts
Faculty of Human and Social Sciences
Faculty of Social Work
Lazaridis School of Business and Economics

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.

To find out more about these beautiful cities, we recommend the following websites:

- ♦ [Kitchener](#); [Waterloo](#); [Brantford](#)

Wilfrid Laurier University: Links & Additional Information

About Us:

- ♦ Discover Laurier: <https://www.wlu.ca/about/discover-laurier/index.html>
- ♦ Laurier Fact Sheet: <https://www.wlu.ca/media/assets/resources/fact-sheet.html>
- ♦ Quick Facts about Laurier: <https://www.wlu.ca/about/index.html>

Strategic Roadmaps:

- ♦ Strategic Mandate Agreement: <https://www.wlu.ca/strategic-mandate-agreement.html>
- ♦ Strategic Academic Plan: <https://downloads.wlu.ca/strategic-academic-plan.pdf>
- ♦ Strategic Research Plan: https://issuu.com/researchstrategicplan_final_web

Leadership:

- ♦ University Board of Governors: <https://www.wlu.ca/board-of-governors/membership.html>
- ♦ University Senate: <https://www.wlu.ca/about/governance/senate/index.html>
- ♦ University Senior Leadership: <https://www.wlu.ca/senior-leadership/index.html>
- ♦ WLU Alumni Association – Board of Directors: <https://www.laurieralumni.ca/>
- ♦ Wilfrid Laurier University Student Alumni Association: <https://www.laurieralumni.ca/>

Development and External Relations:

- ♦ Giving to Laurier: <https://www.wlu.ca/giving/index.html>

Leadership Biographies

Jason Coolman

Vice-President: Advancement and External Relations

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, and a member of the alumni metrics task force and CASE reporting standards working group. In 2011, Coolman's professional accomplishments earned him the Rising Star award from CASE District II and in 2016 he received the CASE Crystal Apple award for outstanding teaching.



Micheál J. Kelly, PhD

Dean of the Lazaridis School of Business & Economics

Dr. Kelly serves as Dean of the Lazaridis School of Business & Economics at Wilfrid Laurier University. He also serves as director at the Canada Israel Industrial Research Foundation; chair of the Governance Committee at Economical Insurance; is a member of the Strategic Advisory Board for the ADGA Group; and vice chair of the Board of Directors for Waterloo North Hydro.

The former dean and professor of strategic and international management in the Telfer School of Management at the University of Ottawa, Dr. Kelly also served the University as professor of strategic and international management. Prior to the University of Ottawa, Dr. Kelly served as director of investment partnerships for the Canadian Department of Foreign Affairs and International Trade. He also served as a senior advisor of international affairs for the Department of Industry and as a senior policy advisor for the Ministry of State for Science and Technology.

In addition to a lengthy list of scholarly and professional articles, Dr. Kelly reviews books on business for the Ottawa Business Journal.

In recognition of his scholarship and contributions to his field, Dr. Kelly has received several awards and recognitions including the prestigious Queen Elizabeth II Diamond Jubilee Medal in 2012 and the Queen Elizabeth II Golden Jubilee Medal in 2002.

Dr. Kelly earned a Bachelor of Arts in foreign affairs and economics, cum laude, from Assumption. He then pursued a master's degree in political science and international relations at the University of Ottawa and a doctorate in political science at Carleton University.



Organizational Chart

