



EXECUTIVE DIRECTOR, DONOR EXPERIENCE

Executive Brief



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FOR MORE INFORMATION

KCI (Ketchum Canada Inc.) has been retained to conduct this leadership search on behalf of Western University. For more information about this opportunity, please contact Ellie Rusonik Vice-President, Search + Talent at WesternDE@kcitalent.com.

All inquiries and applications will be held in strict confidence. **Please send a resume and letter of interest, to the email address above, and note that the deadline for submission is October 18, 2023.**

This position is open to all Canadian citizens, permanent residents and those legally able to work in Canada. Other individuals may also be considered, per Canadian immigration laws. Candidates should please include their status when applying for this position.

The University invites applications from all qualified individuals. Western is committed to employment equity and diversity in the workplace and welcomes applications from women, members of racialized groups/visible minorities, Indigenous persons, persons with disabilities, persons of any sexual orientation, and persons of any gender identity or gender expression.

We are grateful to live, work and play on these lands. Western University is located on the traditional lands of the Anishinaabek, Haudenosaunee, Lūnaapéewak and Chonnonton peoples, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. This land continues to be home to diverse Indigenous Peoples (First Nations, Métis and Inuit) whom we recognize as contemporary stewards of the land and vital contributors to our society.

Executive Director, Donor Experience

THE OPPORTUNITY

The Executive Director, Donor Experience will provide strategic direction and leadership for the development of recognition, stewardship, and engagement strategies for all donors to Western. The role will provide strategic and operational leadership to a dedicated team of donor relations professionals and will support and advance institutional objectives related to University Advancement.

The Executive Director will lead proactive cultivation and stewardship strategies in order to advance relationships and giving with Western's most significant donors, in partnership with key relationship managers. Bringing a process and systems orientation, the successful candidate will play a key role in designing, implementing, managing, and evaluating all activities, programs, procedures and long-term goals across University Advancement to ensure a consistent and efficient experience for donors at all levels and to contribute to the growth of fundraising performance across the University.



Reporting to the AVP, Development, the Executive Director will participate as a member of the Development leadership team and serve as an expert, coach and partner for university development staff related to donor stewardship and engagement activities. The role will work directly with the University's most generous donors and senior volunteers and will interact with institutional leaders at all levels, including the President, Deans, Chairs, Vice-Presidents, Associate Vice-Presidents, Professors and student leaders on development projects and strategy.

The salary range for this position is \$125,000-\$150,000 per annum, plus a comprehensive suite of [benefits](#) and [pension](#). This is a permanent, full-time position and will be based on campus at Western University in London, Ontario.

ABOUT WESTERN UNIVERSITY



Western has an impressive track record of success – achievements we take pride in and that have paved a road towards an even brighter, bolder future. But never settling for the status quo, Western seeks to maximize its potential as an academic community and increase the impact of its research, teaching, and community engagement. The University's newly released Strategic Plan, [Towards Western at 150](#), outlines a bold, inclusive vision

for Western's future, and outlines our priorities and aspirations while serving as the cornerstone of our public accountability.

Combining academic excellence with life-long opportunities for intellectual, social, and cultural growth, Western has been preparing future leaders for careers of impact in their communities since 1878.

A vibrant centre of learning with nearly 45,000 students from 128 countries, we offer more than 400 combinations of undergraduate majors, minors and specializations offered through 12 faculties and schools, and three affiliated university colleges. This includes 88 different graduate degree programs, many of which are interdisciplinary, offered through the School of Graduate and Postdoctoral Studies, as well as professional programs in Medicine, Business, Law and Engineering.

Ranked among the top 1% of higher education institutions worldwide, Western is Canada's third-largest research-intensive university and is a founding member of the U15 group of Canada's most distinguished research universities. As one of the region's largest employers, Western has an operating revenue of nearly \$800 million, and more than 11,000 full and part-time staff and faculty.



One of the oldest and most beautiful universities in Canada, Western is located on over 55 hectares (1,120 acres) along the banks of the Thames River in London, Ontario providing a unique community feeling. The main campus offers nine student residences, housing either first-year students or upper-year students, plus three on-campus apartments strictly for upper-year and graduate students.

The University Community Centre serves as Western's student activity centre, with spaces for student government, social, cultural, entertainment and recreational activities. The University Students' Council recognizes more than 180 student organizations and clubs which cover a wide range of interests such as academics, culture, religion, social issues, and recreation.

ADVANCEMENT AT WESTERN UNIVERSITY

The University Advancement division plays a leading role in strengthening awareness of, and support for the University's mission and goals by leading alumni relations and fundraising efforts across campus and beyond. All departments within the Division build enduring alumni and public trust through understanding and support for Western University in a coordinated campuswide effort that results in the engagement and funding needed to make an impact. There are 3 departments within the Division – Departments of Development, Alumni Relations and Advancement Operations.

Key Goals of the Unit:

- To connect Western's alumni, friends, students, parents, faculty, staff, corporations and foundations through strategies and programs that build long-term relationships and philanthropic support for the University.
- To establish, grow, foster, and maintain relationships with the donor community to maximize financial support for Western.
- To actively participate in ensuring the successful implementation of strategies to meet the annual and long-term goals and targets set for specific priorities.
- To align closely with the alumni relations and development process across Western to leverage and foster philanthropy.
- To provide donors and prospects with a high degree of service and timely response.
- To recognize donor contributions to Western and appropriately develop plans for recognition/stewardship activity of donors.
- To represent the Department of Development and Western University, advocating and adhering to professional values and evidencing exemplary professional conduct in all interactions.

Thanks to the generosity of our alumni, friends, faculty, staff, students, and volunteers, Western celebrated the conclusion of a multi-year capital campaign, [*Be Extraordinary*](#), in 2018 which raised \$805 million. This historic achievement would not have been possible without their support. Together, we have created a university with a sharpened focus, enhanced Canada's best student experience and continued a legacy of exceptional teaching and research.

University Advancement is actively engaged in the early stages of the most ambitious fundraising and alumni engagement campaign in its history, a key priority outlined in *Towards Western at 150: Western University Strategic Plan*.

ADDITIONAL INFORMATION

- [Western University](#)
- [Donor Impact Reporting](#)
- [Facts and Figures](#)
- [Alumni Newsletters](#)
- [Western News](#)
- [Western University Financial Statements 2021-2022](#)
- [Towards Western at 150](#)

KEY RESPONSIBILITIES & ACCOUNTABILITIES

Strategic Leadership

- Participates with University Advancement Leadership in setting, implementing, monitoring, and evaluating long-term advancement strategies and campaigns for Western.
- Partners with Advancement Operations and their team to support operational initiatives within University Advancement (e.g., orientation and onboarding programs, culture and employee engagement, talent development, subject matter experts on CRM and business intelligence initiatives, and financial reporting on Projects/Funds).
- Participates with AVPs and EDs in University Advancement, and the VP, University Advancement, in setting, implementing, monitoring, and evaluating long-term development strategies and campaigns for Western.
- Provides direct staff support to President and Vice President University Advancement for individual prospect, donor and alumni meetings as well as University events, both within Canada and internationally.
- Presents on key performance indicators related to their portfolio and prepares reports for University Advancement leadership on the implementation of projects and programs, successes, and areas of improvement.
- Provides expertise to the AVP (Development), Vice-President (University Advancement), and the President & Vice-Chancellor on appropriate recognition, stewardship, and engagement of donors.

Department Planning & Oversight

- Leads and plays a key role in designing, implementing, managing, and evaluating donor recognition, stewardship and engagement strategies, activities, programs, processes, and long-term goals across University Advancement to ensure a consistent donor experience and to contribute to the growth of fundraising performance across the University (currently a 3-year rolling average of \$83M per year with planned growth to \$100M+ annually).
- Leads the design and implementation of a development volunteer engagement strategy in support of Western's fundraising priorities.
 - Leads the establishment of a campaign cabinet of Western's most significant donors who will play a critical role in soliciting their peers.
- Develops and delivers a wide range of programs designed to foster and enhance Western's relationship with its donors and volunteers including alumni, friends, faculty, staff, students, corporations, and foundations. Programs may include, but are not limited to:
 - Preparation, finalization, and distribution of concise and well-written donation, grant and sponsorship agreements in accordance with Western policies, procedures, and guidelines.
 - Systematic tracking, scheduling, coordination, and integration of stewardship and reporting requirements across programs.
 - Gift acknowledgement.
 - Leadership and coordination of public gift announcements, recognition events or activities.
 - Developing a cross-campus approach to naming opportunities and fulsome, leading-edge donor recognition tactics.
 - Preparation and delivery of highly designed, expertly prepared stewardship reports for specific donors and groups of donors.
 - Impact reporting across all areas of campus.

- Providing a range of donor relations and creative problem-solving support to assist development staff in supporting donors and prospects.
- Providing guidance and oversight in the expansion of the multi-year strategic and comprehensive donor programs, and plan to identify and deliver coordinated and integrated baseline communications to all donors.
- Overseeing the creation of tools and conceptualizing and developing leadership training as well as additional tools to aid development staff in donor programming.
- Providing customized stewardship planning for the most significant donors.
- Providing leadership for events and other recognition methods.
- Develops strong, collaborative working relationships with Western Communications colleagues to ensure smooth and successful delivery of donor recognition, stewardship, and engagement activities, including gift announcements and donor-facing communications.
- Works in collaboration with AVP Development and Advancement Operations on the budgeting process for their portfolio (approximately \$100K) ensuring resource allocations align to the strategic priorities of the unit.
- Develops and maintains a strong partnership with colleagues in Western Communications, and other units within University Advancement, including with the:
 - Executive Director, Principal Gifts, and their team to ensure appropriate and meaningful recognition, stewardship and engagement of the University's most generous donors, including gift announcements, specialized engagement opportunities and development of custom stewardship and engagement plans.
 - With the Executive Director, Faculties and Divisions and their team to develop and implement strategies for appropriate recognition, stewardship, and engagement of major and principal gifts donors.
 - With the AVP Alumni Relations and their team to develop and implement strategies to engage donors, from mass engagement strategies to highly personalized events, including gift celebrations.
 - With the Executive Director, Annual, Leadership and Legacy Giving and their team to develop and implement strategies for appropriate recognition and stewardship of annual, leadership and legacy gift donors.
 - With the ED, Advancement Operations, and their team to develop and implement strategies to support donor stewardship including CRM tracking and donor funds management business processes.

Team Leadership

- Provides strategic and integrated leadership to the Donor Relations and Stewardship team (approximately 4 staff with planned growth to meet Campaign needs), while articulating a clear vision, which supports and enables staff to excel in the delivery of programs.

Outcomes the Role is to Achieve

Advising and Guidance

- Senior leaders, fundraising staff and other stakeholders receive informed guidance regarding development policies, practices, and procedures.

Client Services

- The University community is served by an engaged and motivated team focused on delivering excellent customer service.

Leadership/Management

- Skilled and collegial leadership to a unit of direct reports, through management and evaluation through metrics on program activities, regular performance feedback and support of development plans.
- Unit goals and work plans are aligned with Western's strategic directions and the current campaign strategy.
- Efficient and effective financial and human resource plans for the portfolio that comply with administrative controls, contracts, and other relevant practices.
- Change initiatives are supported by implementing new directions and providing appropriate information to clients.

Problem-Solving

- Sound decisions are based on a mixture of analysis, wisdom, experience and judgment.

Relationships

- Mutually beneficial relationships with donors that enable engagement, maximize gift support and foster continued giving to Western.

CANDIDATE QUALIFICATIONS & EXPERIENCE

Required Education and Experience

- Senior-level experience in stewardship, fundraising, donor communications, advancement operations, or a related field.
- Leadership experience with accountability for leading staff, budgets, and projects.
- Experience working in a university or other complex non-profit environment preferred.
- Certified Fundraising Executive (CFRE designation) preferred.
- A minimum of an undergraduate degree.

Knowledge, Skills, Abilities and Attributes

- Demonstrated knowledge and understanding of fundraising activities, donor motivations, and donor stewardship best practices, donor accountability.
- Experience with major gift fundraising and donors, and an understanding of stewardship frameworks and customized experiences.
- Demonstrated success strategically building donor stewardship and engagement programs, protocols, policies, and processes to support the delivery of meaningful donor experiences.
- Extensive senior volunteer management experience, with proven success in establishing relationships with individuals of influence to drive development strategies and outcomes.
- Familiarity with the Association of Fundraising Professionals (AFP) Code of Ethics and the Four Pillars of Donor Relations.

- Ability to collaborate across internal and external boundaries to meet common objectives, improve outcomes and support work beyond one's unit.
- Extensive knowledge of fundraising and stewardship communications.
- Oral and written communication skills with an emphasis on report development.
- Competency to maintain confidentiality and treat sensitive information with discretion.
- Critical thinking and analytical skills to assess complex higher education issues of concern to stakeholders, including the media, the public, and prospective donors.
- A desire to grow and advance skills, which is demonstrated by attending conferences, workshops and other professional developmental opportunities to enhance performance.
- Ambitious with the ability to identify opportunities, develop action plans and set challenging goals in order to achieve desired outcomes.
- Ability to remain highly motivated, resilient, innovative, and collaborative when faced with challenges
- Advanced computer skills, including experience with Microsoft Office software applications and client/donor relations management software.
- Experience using technology to monitor donor engagement activities.
- Influential interpersonal skills that build positive and strong relationships at all levels of the organization.
- Leadership skills with an ability to delegate work and provide team members with clear direction and support in meeting objectives and lead employees to excellence.
- Ability to develop strategies that are in line with the University's mission and which balance competing priorities.

LIVING IN THE LONDON REGION

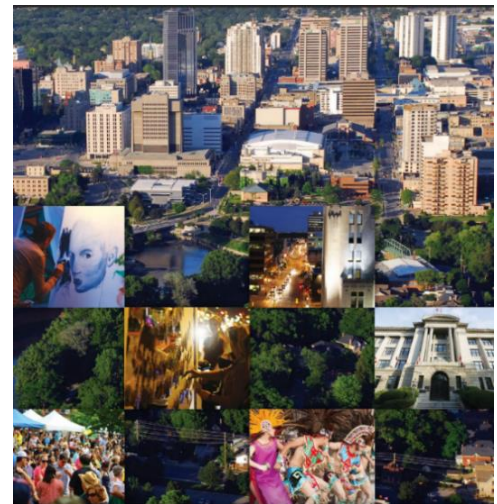


London is Canada's 11th largest city and an ideal environment in which to work, live, and play. Set in the heart of Southwestern Ontario, midway between Toronto and Detroit, London is the region's economic, entertainment, and cultural hub.

With its numerous educational offerings,

extensive public health care system, and lower cost of living than many Canadian cities, London is a highly desirable community for people at all stages of life. Affectionately known as the Forest City, London sports more than 200 treed areas and public parks with an extensive trail system that runs along the Thames River.

London has a population of more than 500,000 and it continues to play a key role as a regional hub for Southwest Ontario, a region of about 2 million people. Merging our historical expertise in manufacturing, agriculture, and healthcare with emerging sectors like robotics, digital creative, and financial technology, London is a leader in commerce, culture, and innovation.



BIOGRAPHIES

Alan Shepard, President & Vice-Chancellor



Professor Alan Shepard is the 11th President & Vice-Chancellor of Western University. He arrived at Western in July 2019 after serving as President & Vice-Chancellor of Concordia University in Montreal. Prior to Concordia, Professor Shepard was Provost and Vice-President (Academic) of Ryerson University in Toronto. He has also held senior academic leadership roles at the University of Guelph, Texas Christian University, and the University of Virginia.

American-born, Alan was the first of his family to attend university when he enrolled in St. Olaf College in Minnesota. At the end of the first year, he realized academia was the life he wanted. Elected to Phi Beta Kappa as an undergraduate, he earned a PhD in English from the University of Virginia, and his scholarship has since been supported by the University of Toronto and the Folger Library in Washington. He is the author and editor of three books and many articles focused on the culture of early modern England, early modern literature and science, modern theatre, the future of innovation and the future of universities.

Beyond his university leadership role at Western, Alan is also actively involved in the community. He has served as a volunteer for organizations including Universities Canada and the Montreal Chamber of Commerce. Currently, Alan serves as a Vice-Chair on the Executive Committee of the [U15 Group of Canadian Research Universities](#), and also as a board member for the [London Economic Development Corporation](#), [Business + Higher Education Roundtable](#), and the [Stratford Festival of Canada](#).

Dana James, Associate Vice-President, Development



Dana James was appointed Associate Vice-President, Development in January 2022.

In her 15 years in University Advancement, Dana has been fortunate to contribute to two major campaigns. As Director, Major Gifts at Ivey Business School from 2008–2014, Dana played a key role in the success of Ivey's Campaign for Leadership which generated \$133 million in private sector support. She joined the central Western University team in 2014 as Associate Vice-President, Principal Gifts. With a focus on gifts of \$1 million+, she engaged volunteers and drove fundraising results for the last 4 years of Western's Be Extraordinary Campaign, which raised \$806 million. As Associate Vice-President, Development, she is excited about participating in the planning and execution of Western's next campaign, now underway.

Prior to joining Western, Dana had the opportunity to work in medical research and health care environments in senior fundraising positions at Mt. Sinai Hospital Foundation in Toronto and at Robarts Research Institute prior to its merger with Western's Schulich School of Medicine and Dentistry. Dana has a strong track record of fundraising success and executive leadership. She is a dynamic and strategic leader who works collaboratively with her colleagues in University Advancement and across Western to ensure that our fundraising efforts are aligned with our priorities and has built positive and lasting relationships with our alumni and donors.

Dana is a proud alumna of Western, graduating from the Faculty of Information and Media Studies with a Master's in Library and Information Science in 2001.

ORGANIZATIONAL CHART – DEVELOPMENT TEAM

