

## Candidate Brief



**SIMON FRASER  
UNIVERSITY**

**Director, Donations Administration & Strategic Projects**

**February 2023**



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Simon Fraser University is Canada's engaged university, defined by our dynamic integration of innovative education, cutting-edge research, and far-reaching community engagement. We are unconventional, fearless, compassionate, approachable, and ready. We celebrate the diversity of people, ideas, and cultures.

**SFU's Office of Advancement and Alumni Engagement (AAE)** works with community leaders and alumni to further the mission of the University and provide valuable services to Alumni. The AAE team has been revitalized under a new Vice-President and has ambitious plans to build out both its infrastructure and community engagement activities to ensure the AAE team has the scope and abilities that match those of SFU's.

A key player in the AAE's foundational Advancement Services Unit is the **Director of Donations Administration and Strategic Projects**. This crucial role ensures that donor gifts and records are treated with the best and most rigorous financial regulation and precision, that donor agreements are effective and accurate, and that other key financial processes are both strategically sound and held to the highest industry standards.

This is a unique and rare career opportunity for a dedicated operational executive to:

- Bring a strategic and customer- and donor-service lens to crucial fundraising operations;
- Ensure best practises for SFU's fundraising and donations processing teams;
- Be a thoughtful cross-collaborative partner with leaders in fundraising, alumni relations, and advancement broadly;
- Help lay the groundwork for the comprehensive fundraising and alumni engagement campaign;
- Bring exceptional leadership and management to a diverse team of professional staff.

*The following pages provide a summary of the role; please see page 10 for candidate information, and the full official job description is appended.*

We acknowledge the xʷməθkʷəy̓əm (Musqueam), Skwxwú7mesh Úxwumixw (Squamish), səliłwətaʔt (Tsleil-Waututh), qícəy' (Katzie), kʷikʷəłəm (Kwikkwetlem), Qayqayt, Kwantlen, Semiahmoo and Tsawwassen peoples on whose traditional territories our three campuses reside.

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## SIMON FRASER UNIVERSITY

Consistently ranked among Canada's top research-intensive universities, SFU is globally recognized for excellence in research, innovation, and sustainability. And with more than 170,000 alumni around the world, our work and impact can be seen in all corners of the globe.

SFU is repeated ranked as the best Comprehensive School in Maclean's University Rankings. As well, we are ranked #1 worldwide for entrepreneurial spirit, and best in Canada for innovative university and industrial application<sup>1</sup>. All the more remarkable is that SFU is still a relatively young school having been founded in 1965.



As leaders in areas such as public health, climate action, food security and sustainable engineering, our faculty hold many of Canada's highest research honours, such as Royal Society of Canada fellowships and college members, Canada 150 Research Chairs, Canada Research Chairs, and 3M National Teaching fellowships. Their

scholarship and innovation are helping to transform the world through partnerships and consultancy with numerous universities, networks, and global organizations such as the United Nations. Sustainability permeates every aspect of SFU, from research and teaching to campus operations and community engagement.

With vibrant campuses in British Columbia's three largest cities—Burnaby, Surrey, and Vancouver—SFU is not just shaping minds, we are also shaping communities. Our globally renowned, Arthur Erickson-designed main campus in Burnaby houses the majority of our world-class academic and research infrastructure. SFU was one of BC's first universities to expand to downtown Vancouver, opening a Vancouver campus in 1989 to foster connections with the business community and meet the educational demands of working professionals, which now encompasses nine sites. Opened in 2002, the Surrey campus extended our community outreach into B.C.'s fastest growing city and today houses cutting-edge initiatives such as the Quantum

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<sup>1</sup> World's Universities with Real Impact Ratings, 2022

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Algorithm Institute and our Sustainable Energy Engineering program and School of Interactive Arts and Technology.

For more information about SFU see <https://www.sfu.ca>; for more on SFU's AAE team, please see <https://www.sfu.ca/about/give.html> and <http://www.sfu.ca/alumni.html>

## POSITION SUMMARY

SFU's AAE staff team of about 80 people raises \$30+ million per year, from well over 4,000 donors who make 20,000 gifts. AAE is starting a major comprehensive campaign this year and this role will be one of the key strategic leadership positions to properly plan and launch this multi-year campaign. As a key member of the Advancement Services team, the Director, Donations Administration and Strategic Projects reports to the Senior Director, Advancement Services and:

- provides financial, operational, and administrative leadership to the AAE Donations Administration unit;
- supports Advancement's strategic goals and objectives with a focus on financial projects and initiatives and oversees all activities to ensure compliance with institutional policies, Canada Revenue Agency (CRA), Internal Revenue Service (IRS) regulations and industry best standards;
- supports and provides expertise to a wide range of functions within Advancement, including budget planning, resource allocation, personnel planning, and procurement compliance;
- administers donations received within University policies, CRA and IRS regulations;
- designs (and redesigns) financial standards, procedures, and controls;
- develops standards and procedures for requesting and allocating project resources;
- performs financial reporting and analysis, including the preparation of internal financial and procurement compliance reports.



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## DUTIES AND RESPONSIBILITIES<sup>2</sup>

The Director's duties can be grouped more specifically into the following areas:

**1. Donations Administration:** The Director provides financial, operational, and administrative leadership, and gift reporting compliance by:

- Overseeing the development, and maintenance of all operating guidelines and procedures for gift acceptances per CRA rules and in line with the SFU policies and regulations.
- Ensuring a robust and effective suite of processes and procedures, including but not limited to gift in kind acceptance, gift agreement template(s), pledge revision and write off policies, reporting processes, and receipting.
- Providing guidance to the Donations Administration team in the application of institutional policies, CRA and IRS regulations.
- Ensuring donor gifts are aligned with philanthropic objectives and ensuring compliance with SFU Finance, accounting for donor accounts expendable and endowments and donor reporting.
- Leading processes and adherence to industry standard data for Education Advisory Board (EAB) and Council for Advancement and Support of Education (CASE) surveys related to best practices in advancement operations.
- Directing, validating, and producing the various financial and revenue reports for private donations, alumni giving and participation.
- Directing, validating, and designing various extraction processes on donor annual endowment reports and student support disbursements, projects, and funds.
- Providing recommendations on financial and accounting systems for donation processing and representing the department in the internal IT committee to support senior-level decision making.

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<sup>2</sup> Please see the appendix for the full job description and detailed duties, on page 11.

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**2. Financial Projects and Initiatives:** The Director leads financial projects and initiatives in support of the strategic objectives of AAE by:

- Managing the planning, implementation and execution of strategic initiatives and projects; identifying resource requirements and setting timelines.
- Monitoring timelines and providing regular updates to senior administrators on the achievement of project goals and objectives.
- Supporting the development of business requirements and gap analyses; obtaining approvals for project plans to ensure the delivery of outcomes are consistent with project plans.
- Conducting cost-benefit analysis and research to develop solutions and make recommendations in support of decision-making.
- Conducting periodic quality assurance reviews throughout the project lifecycle; identifying issues and making recommendations to adhere to quality control standards.

**3. Other functions:** The Director supports an additional broad range of functions, budget planning, resource allocation, financial and personnel planning and procurement compliance, as required.

These include:

- Compliance and governance related to areas such as data privacy, tax receipting, donation solicitations, gift acceptance.
- Overseeing and signing off on official documents pertaining grant contracts/agreements, tax returns and major financial reports.
- Acting as Treasurer, Secretary, and Board Director for the Friends of SFU – a US registered charity in Washington state. Activities include accepting gifts using wire transfers, US stocks, and cheques; looking ahead, there is a need to expand US giving options and opportunities.
- Being the liaison for the SFU Foundation's tax receipting.



4. **Leadership and Collaboration:** The Director leads a dedicated staff team and collaborates within AAE, and across the University by:

- Supervising four direct reports, and a total staff team of 11. Provides guidance and mentorship; ensures the appropriateness and currency of job responsibilities; recruits, hires, and evaluates performance; approves leaves and training and development.
- Working closely with senior administrators within the department, with particular engagement with leaders in annual giving and campaign planning.
- Collaborating with AAE leadership and SFU legal on complex cases requiring the evaluation of gifts acceptance processes.
- Partnering with a wide circle of contacts and involves them in generating mutually beneficial opportunities and achieving agreeable outcomes.
- Shares ideas, issues, and opportunities with members of external networks.
- Attending and maintains relationships with relevant formal and informal professional groups and organizations.
- Serving on committees related to donor contributions as appropriate.
- Liaising with members of Canada Revenue Agency, United States Internal Revenue Service, BMO Nesbit Burns Inc. related to financial transactions.



## DESIRED TRAITS AND COMPETENCIES

The ideal new Director will possess the following traits or will have:

- A customer-service focus and donor-centric mindset; dedicated to understanding and serving AAE's bottom-line goals of raising money and engaging alumni.
- An understanding of the business of fundraising, ideally developed from working at a fundraising charity.
- Both proactive and responsive to customer and leadership needs; organized and prioritizes well.

- Cross-functional collaboration skills; ability to work with technical and subject-matter experts.
- Exceptional leadership abilities: a mature, communicative and coach who empowers staff; recognizes and celebrates the contributions of others, and makes people feel valued.
- The ability to thrive in a complex environment; excited by change; comfort managing projects through ambiguity with tact and diplomacy.
- Strong interpersonal skills, particularly an adept and active listener who seeks feedback from their team and others.
- Strong attention to detail, and adept at setting up efficient structures; effective deployment of technology to support the business.
- An operations focus and driven to support systems and policies. Seeks improvement and open to ideas.
- Calm, self-aware, emotional intelligence, and empathy.

## QUALIFICATIONS

The new Director's skills and background would ideally include:

- Proficiency in the use of spreadsheets, databases, and enterprise-level financial and record management information systems.
- Excellent knowledge of CRA and IRS regulations related to donations and fundraising as well as industry standards such as CASE.
- Knowledge of the design and development of financial models for projecting key revenues and expenses and conducting analyses.
- Strategic planning and organizational development skills.
- Financial analysis, budget planning, and financial management skills.
- Interpersonal and communication (oral, written, and presentation) skills; ability to develop relationships and partnerships and to work collaboratively at all levels and areas within the organization.





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- Leadership, team management, mentorship, and motivational skills; experience leading in a unionized environment would be helpful.
  - Analytical reasoning, quantitative analysis, and organizational skills.
  - Ability to identify and understand the need for integration of multiple initiatives and to develop appropriate strategies to achieve results.
  - Bachelor's degree in Business Administration or a related field, or an equivalent combination of education, training, and experience.

## FOR MORE INFORMATION & TO APPLY

To apply or learn more, please contact the University's search partner, Christoph Clodius at The Discovery Group, at [christoph@thediscoverygroup.ca](mailto:christoph@thediscoverygroup.ca).

Deadline: All submissions should be received by April 14, 2023

## COMPENSATION & PERQUISITES

Compensation, Perquisites and Work Environment: As a member of the Administrative & Professional Staff Association, the Director will have a comprehensive benefit package that includes generous holidays, a University-paid pension plan, extended medical/dental coverage, tuition waiver/reimbursement, an annual pro-D budget, and other perquisites. SFU also offers a hybrid work environment.

The Director's compensation is classified as Grade 13, with a range between \$94,369 – 112,691.

SFU is committed to the principle of equity in employment and offers equal employment opportunities to all qualified applicants.

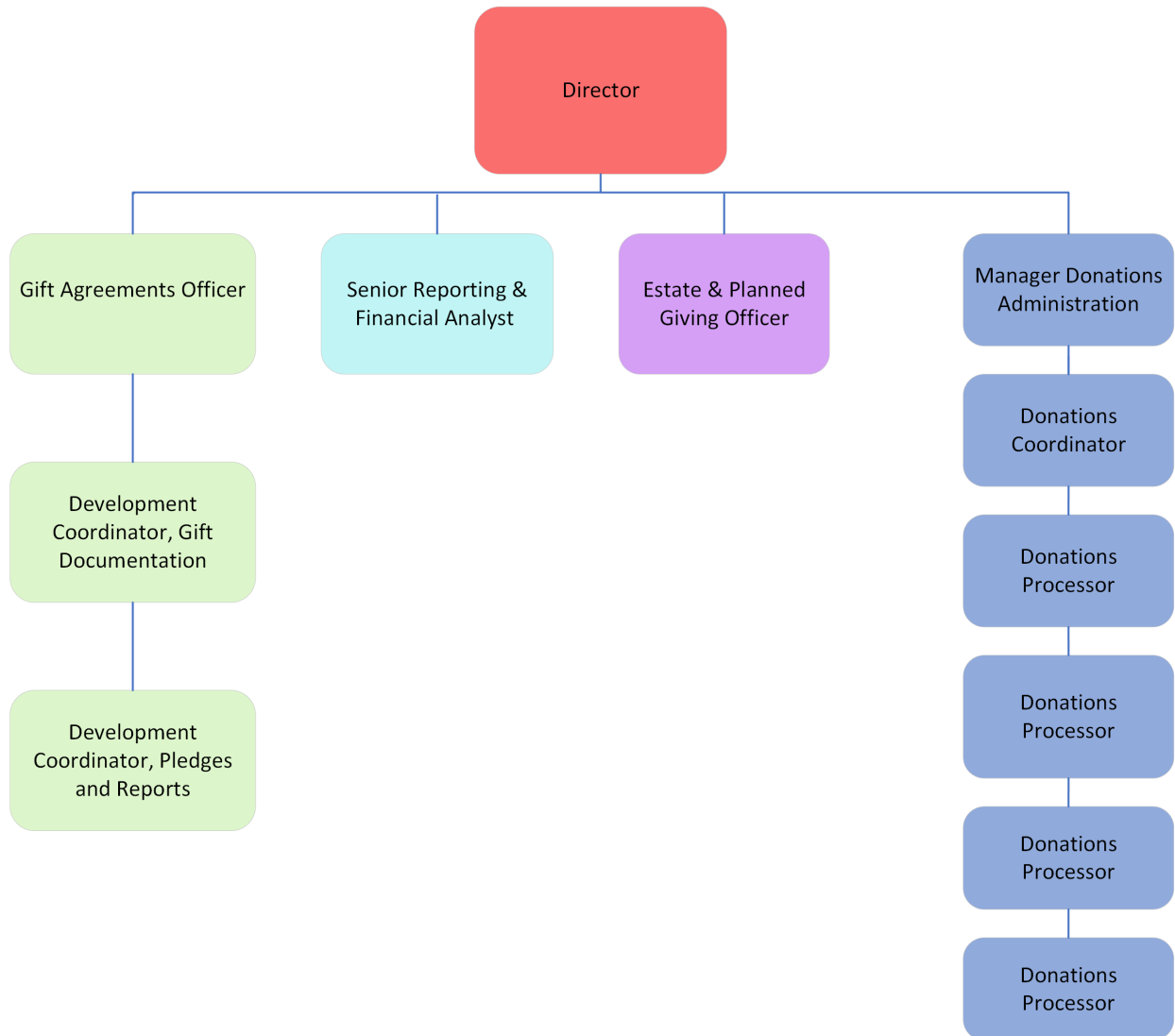
## WORKING AT SFU

SFU has been recognized as one of Canada's Top Employers, Top Employers for Canadians over 40, Canada's Top Family-Friendly Employers, and BC's Top Employers. We are dedicated to creating a workplace that values a healthy work-life balance, professional growth and development, and community engagement.

SFU is a founding partner with the Canadian Centre for Diversity & Inclusion and is a Regional Partner with Pride at Work Canada. Ensuring our campuses are welcoming places and that all employees feel a sense of belonging, inclusion, fairness, and mutual respect, is a priority.

## Appendix 1:

### Director's Org Chart:



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## Appendix 2: Full Job Description

### POSITION SUMMARY

The Director, Donations Administration and Strategic Projects is a key resource within Advancement and Alumni Education (AAE), responsible for providing financial, operational, and administrative leadership to the AAE Donations Administration unit. The role provides support to the supervisor to advance on Advancement's strategic goals and objectives with a focus on financial projects and initiatives and oversees all activities to ensure compliance with institutional policies, Canada Revenue Agency (CRA), Internal Revenue Service (IRS) regulations and industry best standards. The Director also supports and provides expertise to a wide range of functions within Advancement, including budget planning, resource allocation, personnel planning, and procurement compliance.

### DUTIES AND RESPONSIBILITIES

1. **Provides financial, operational, and administrative leadership to AAE Donations Administration unit and oversees compliance of gift reporting by:**
  - Leading processes and adherence to industry standard data for Education Advisory Board (EAB) and Council for Advancement and Support of Education (CASE) surveys related to best practices in advancement operations.
  - Overseeing the development, and maintenance of all operating guidelines and procedures for gift acceptances per CRA rules and in line with the SFU policies and regulations.
  - Providing guidance to the Donations Administration team in the application of complex institutional policies, CRA and IRS regulations.
  - Ensuring alumni and donor gifts are aligned with philanthropic objectives and ensuring compliance with SFU Finance, accounting for donor accounts expendable and endowments and donor reporting.
  - Directing, validating, and producing the various financial and revenue reports for private donations; alumni giving and participation.
  - Directing, validating, and designing various extraction processes on donor annual endowment reports and student support disbursements, projects, and funds.
  - Providing recommendations on financial and accounting systems for donation processing and representing the department in the internal IT committee to support senior-level decision making.
2. **Provides leadership to the management of financial projects and initiatives in support of the strategic objectives of AAE by:**
  - Managing the planning, implementation and execution of strategic initiatives and projects; identifying resource requirements and setting timelines.
  - Monitoring timelines and providing regular updates to senior administrators on the achievement of project goals and objectives.

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- Supporting the development of business requirements and gap analyses; obtaining approvals for project plans to ensure the delivery of outcomes are consistent with project plans.
  - Conducting cost-benefit analysis and research to develop solutions and make recommendations in support of decision-making.
  - Conducting periodic quality assurance reviews throughout the project lifecycle; identifying issues and making recommendations to adhere to quality control standards.
  - Identifying the need for the initiation and development of new projects or initiatives to meet the overall goals and objectives of the VPAAE.
  - Conducting research, defining, and quantifying issues and preparing reports.
3. **Provides support to a broad range of functions, including budget planning, resource allocation, financial and personnel planning and procurement compliance, as required.**

### IMPACT OF DECISION MAKING

The Director, Donations Administration and Strategic Projects is responsible for making decisions regarding:

- The administration of donations received within University policies, CRA and IRS regulations.
- Financial reporting and analysis, including the preparation of internal financial and procurement compliance reports.
- The redesign of financial standards procedures and controls.
- The development of standards and procedures for requesting and allocating project resources.

### PROBLEM SOLVING AND LEVEL OF SUPERVISION

The Director, Donations Administration and Strategic Projects is responsible for solving problems related to:

- Complex cases requiring the evaluation of gifts acceptance processes and works with AAE leadership and SFU legal on those cases.
- The prioritization of multiple, competing project timelines, milestones, and deliverables.

### RELATIONSHIPS

Sets objectives necessary for obtaining feedback and assistance. Partners with wide circle of contacts and involves them in generating mutually beneficial opportunities and achieving agreeable outcomes. Shares ideas, issues, and opportunities with members of personal network. Seeks referrals from others with relevant expertise and influence. Attends and maintains relationships with relevant formal and informal professional groups and organizations.

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## Supervisory

Supervises staff by providing guidance and mentorship, ensuring the appropriateness and currency of job responsibilities, initiating recruitment for temporary and continuing staff, hiring staff, providing, or directing the provision of training, evaluating performance, approving leaves and training and development, responding to grievances, and approving leaves of absence.

**Internal Connections/External Connections** – Works closely and collaboratively with the supervisor on the development of strategies and initiatives. Works closely with senior administrators within the department. Serves on a wide range of committees related to donor contributions. Liaises with members in Canada Revenue Agency, United States Internal Revenue Service, BMO Nesbit Burns Inc. related to financial transactions.

## QUALIFICATIONS

- Bachelor's degree in Business Administration with a professional accounting designation (CPA) and seven years of related experience including financial management and personnel management, or an equivalent combination of education, training, and experience.
- Excellent knowledge of University policies, CRA and IRS regulations.
- Excellent knowledge of the design and development of financial models for projecting key revenues and expenses and conducting analyses.
- Excellent strategic planning and organizational development skills.
- Excellent financial analysis, budget planning, and financial management skills.
- Excellent interpersonal and communication (oral, written, and presentation) skills.
- Excellent leadership, team management, mentorship, and motivational skills.
- Excellent conflict-resolution and problem-solving skills.
- Excellent analytical reasoning, quantitative analysis, and organizational skills.
- Ability to develop relationships and partnerships and to work collaboratively at all levels and areas within the organization.
- Ability to identify and understand the need for integration of multiple initiatives and to develop appropriate strategies to achieve results.
- Proficient in the use of spreadsheets, databases, and enterprise-level financial and record management information systems.