

Candidate Brief



**THE UNIVERSITY
OF BRITISH COLUMBIA**

Okanagan Campus

Associate Director of Development

UBC Okanagan

April 2023



Join a bold, world-leading, and highly accomplished development and alumni engagement team at UBC, and help to support the growing Okanagan campus.

The University of British Columbia (UBC) is a global center for research and teaching, consistently ranked among the top 20 universities in the world. UBC's Okanagan campus has the remarkable advantage of having a world-class university here in the Okanagan, an unparalleled experience in Canada. Based in Kelowna, is a comprehensive, research-intensive learning community embracing bold new ways of thinking that attract exceptional students and faculty. More than 12,000 students from throughout the Okanagan region, across Canada, and 109 other countries are enrolled in undergraduate and graduate programs in nine faculties and schools at UBC Okanagan.

To support this innovative work and these exceptional students, the Okanagan Development & Alumni Engagement (DAE) team seeks a new **Associate Director, Development** to engage donors in the life of the University and raise major gifts in support of Okanagan campus priorities. As a key member of the development team, the Associate Director will partner with key Okanagan academic and programmatic leads to solicit, close and steward major gifts, and ensure appropriate donor recognition, acknowledgement and stewardship programs are in place.

This is an exciting time to join DAE with the launch of **FORWARD**, its most exciting fundraising and alumni engagement campaign ever. **FORWARD** will help advance healthy lives, create solutions for the planet, and shape thriving societies.

Additionally the AD will have the chance to:

- Help the Okanagan's student, research, and academic life in tangible and rewarding ways;
- Leverage UBC's overall brand and reputation, and its tremendous impact in the region, allowing donors to have an outsized impact for their support;
- Make a mark in one of Canada's largest-ever post-secondary advancement campaigns, in a highly professionalized and dedicated advancement team;
- Be an anchor staff member and take on a larger leadership role as the Okanagan DAE team expands and grows in future years.

The following outlines the opportunity in more detail; information for candidates is on page 10.



○ DISCOVER EXCEPTIONAL ○
thediscoverygroup.ca

ABOUT UBC OKANAGAN

UBC Okanagan is a comprehensive, research-intensive learning community embracing bold new ways of thinking that attract exceptional students and faculty. A model of diversity and unparalleled local and international engagement, UBC Okanagan embodies the University of the future. Young, nimble, and growing rapidly, we are deeply committed to Indigenous and other community partnerships, and welcome students and faculty from across our region, and around the world. Our inclusive interdisciplinary programs draw thousands of first-generation learners, Indigenous students, and young people from all backgrounds.

UBC Okanagan has emerged as a regional powerhouse boasting an intimate and entrepreneurial academic community that stretches the boundaries of teaching, learning and research to advance the greater good. From helping older adults age in place, to transformative water management strategies, and the impacts of climate change on infrastructure and endangered ecosystems, UBC Okanagan researchers are changing how we live—here at home and around the globe. Our academic programs have expanded to include unique new offerings such as Canada’s first bachelor’s degree in Indigenous language fluency, and a new Bachelor of Sustainability.

UBC Okanagan is now the country’s fastest growing campus; in just under two decades our student population has grown three-fold to nearly 12,000, and our research funding has likewise tripled to \$50 million. We proudly celebrate more than a decade of growth and discovery including almost 200 collaborative research ventures with industry, governments, and non-profits.



Purpose-built for the 21st century, UBC’s Okanagan campus opened in Kelowna in 2005. Rooted in community and, uniquely, founded in partnership with the Syilx Okanagan Nation, we have always worked collaboratively to understand local needs and uncover home-grown solutions—with global applications. UBC is deeply committed to Indigenous partnerships and when first established, UBC’s Okanagan campus embarked on a new relationship with Indigenous peoples of these lands by signing a MOU with the Chiefs solidifying this commitment.

Looking ahead, UBC Okanagan’s Outlook 2040 Plan sets the beautiful Okanagan campus on its long-term course toward ever greater impact and service to the people of British Columbia. Our ambition is: *to create new opportunities for students while strengthening research ecosystems and building vibrant spaces that foster bold thinking and robust collaboration.*

What comes next will be the result of collective action from our connected—and rapidly expanding—communities: researchers, donors, students, faculty, staff, and more than 20,000 UBC Okanagan alumni around the world.

ABOUT UBC

Established in 1908 in Vancouver, UBC is a publicly supported, medical-doctoral university. It is a global centre for research and teaching, consistently ranked among the top 20 public universities in the world.

For more than 100 years, UBC has lifted its gaze to the horizon, steadily focused on the long view, with all its promise and potential. The creation of UBC's Okanagan campus in 2005 is testament to that relentless pursuit of possibility: a dynamic campus that strengthens UBC's reach, reputation, and impact at home and around the globe.



UBC is home to 65,000 students, including 18,283 international students from 162 countries enrolled in undergraduate and graduate programs. These students are supported by nearly 18,000 faculty and staff on UBC's two main campuses in Vancouver and Kelowna.

UBC is recognized widely for its achievements. World university rankings recognize UBC for its excellence in teaching and research as well as its global impact. The most established and influential ranking all consistently place UBC in the top five per cent of universities in the world. The *Times Higher Education* (THE) ranks UBC second in Canada overall and 47th globally out of more than 1,115 participating institutions from 94 countries, based on its contributions through research, outreach and stewardship.

For more information, please visit: <http://www.ubc.ca/>

DEVELOPMENT & ALUMNI ENGAGEMENT AT UBC Okanagan

The Development & Alumni Engagement (DAE) portfolio at UBC joins development (fundraising) and *alumni UBC* functions under one umbrella. DAE is delivered through a team that provides centralized support to the nine faculties and schools on the Okanagan campus. The team works collaboratively with specialized units in DAE, such as gift and estate planning, corporate and foundation relations, and alumni programming and events, to provide exceptional service to its constituents.

Leadership of the team is provided by the Executive Director (Adrienne Skinner) who reports dually to the Principal & Deputy-Vice Chancellor (who provides overall leadership for UBC's Okanagan campus), and the Associate Vice-President Development for UBC overall.

FORWARD, the campaign for UBC, will raise \$3 billion and activate the power of our global alumni by doubling alumni engagement. The campaign will benefit research, teaching and learning across both the Vancouver and Okanagan campuses in three key areas: Advancing healthy lives, creating solutions for the planet, and shaping thriving societies.

Remarkably, UBC Okanagan has increased its year-over-year fundraising by 60% over five years and achieves \$10 million and engages over 5,000 alumni on an annual basis. FORWARD is expected to support this success by growing the program to a sustainable, new level of \$15 million per year with total funds raised for the campaign projected at \$130 million.

In the recently completed fiscal year, the Okanagan DAE team raised over \$12 million (well over its \$9 million goal) and is achieving its FORWARD campaign goal, having raised \$60.3 million. They also increased non-counted expectancies (future support) from an average of \$133,000/year to over \$1.5 million.

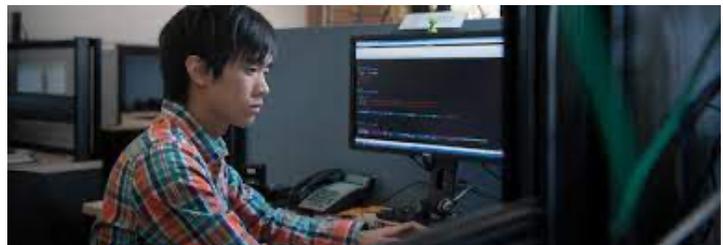
To learn more about FORWARD, see <https://give.ubc.ca/forward/>

UBC Okanagan Fundraising priorities:

UBC Okanagan has the opportunity now to harness energy and collective goodwill to advance audacious goals that benefit the entire planet in FORWARD's three key areas. What the themes mean to the Okanagan campus, and a few key project examples are:

Advancing healthy lives

UBC is committed to strengthening wellness in all its forms—mental, physical, and emotional—across our campuses and communities. As an original signatory of the 2015 Okanagan Charter—a visionary pact by 45 international universities and



colleges to embed health into all aspects of campus culture—UBC Okanagan is proud to model health action and collaboration both locally and globally. We know the solutions required to advance healthy lives will not spring from a single discipline or initiative. We must make space to train the next generation of health-care professionals who will serve our region and strengthen the research infrastructure that will speed life-saving treatments from lab bench to bedside.

For instance, **UBC Okanagan Downtown, the new home for the School of Nursing**, will equip our downtown academic building with critical clinical skills teaching equipment, including patient

simulators. Donor support will support clinical trainees and strengthen research and training programs to help drive new health treatments, systems, and services.

Creating solutions for the planet

Farm to forest, orchard to ocean: sustainability touches every aspect of our living world and significantly impacts environmental, social, and economic health. Among global universities, UBC places in the top three for climate action and in the top five for advancing safe and sustainable cities. At UBC Okanagan, creating solutions for the future of our planet is embedded in every aspect of campus life—from teaching and research to campus operations, student engagement and community outreach. It is the first campus in the world to achieve the distinction of five ‘Green Globes’ for its Arts and Sciences Centre and the Charles E. Fipke Centre for Innovative Research. Already a thriving thought-incubator, UBC Okanagan has the energy, determination, and prime location, to profoundly impact the living world around us. Within 60 km of the Kelowna campus, our researchers have access to every kind of ecosystem currently at risk on our planet: nature’s living laboratories for sustainability science.

Priority projects include:

- **The Interdisciplinary Collaboration and Innovation (ICI) Building** will bring social sciences, natural sciences, humanities, creative fields, and professional disciplines together to facilitate collaboration and enable breakthroughs to solve real world challenges. The building has been designed to provide maximum flexibility through shared and common infrastructure, enabling clusters of interdisciplinary research and teaching activity in areas that will include high value agriculture, health, and data, with social and economic regional development and indigeneity as overarching themes. For more, see <https://ok.ubc.ca/interdisciplinary-collaboration-and-innovation-building/>.
- **UBC Okanagan Next-Generation Battery Research Centre:** Research to develop smaller, safer, and less expensive batteries to power transportation systems and a shift toward a decarbonized future.
- **Centre for Resilient Infrastructure:** As climate change intensifies, natural disasters are becoming more frequent and more devastating to our built environment; this Centre will develop next-generation, adaptive and smart infrastructure to protect our communities.

Shaping thriving societies

At UBC Okanagan, our commitment to resilient societies runs deep: we believe a just and prospering society is grounded in compassion and empathy, strengthened by diversity and inclusion, and fuelled by creativity and community outreach. We are uniquely defined by place and made stronger by our community interconnections at all levels. We are especially dedicated to authentic reconciliation with the people of the Syilx Okanagan nations, on whose traditional lands our campus resides. Each year, hundreds if not thousands of students take their learning

and leadership into the community in diverse and impactful ways through co-op and capstone projects, clinical training placements, cultural and public art activities, and venture creation.

Two representative projects are:

- **Centre for Contemporary Interior Salishan Studies:** The revitalization of Indigenous language through UBC Okanagan's Bachelor of Nsyilxcn Fluency Program, the first of its kind in Canada.
- **Student Affordability Initiative:** 30% to 40% of students are food insecure. Combined with rising housing and transportation costs, students face real barriers to success. The Affordability Initiative creates more need-based awards and services to address student food security.

DEVELOPMENT & ALUMNI ENGAGEMENT AT UBC

UBC's Okanagan DAE team is a part of UBC's broader DAE office. It upholds the University's vision and values by fostering engagement with alumni and friends and by connecting donors to projects and causes that allow them to translate their passions into meaningful action. DAE is one of the leading advancement teams in Canada and the development team in DAE is considered one of the leading fundraising teams in the country. With over 300 employees, DAE currently raises over \$200 million and engages over 86,000 alumni annually.

DAE Purpose: Inspiring engagement and philanthropy to advance UBC's pursuit of excellence.

DAE Vision: To be a bold, world leading and highly accomplished development and alumni engagement program.

DAE Values

- **Excellence:** A profound and aspirational value. The quality of striving to be, and being, outstanding,
- **Integrity:** A moral value. The quality of being honest, ethical, and truthful,
- **Respect:** An essential and learned value. Regard, felt or shown towards different people, ideas, and actions,
- **Accountability:** A personal and public value. Being responsible for our conduct and actions and delivering upon our respective and reciprocal commitments,
- **Communication:** A universal and foundational value. Act of sharing information to promote common understanding,
- **Collaboration:** An intentional value. When we work together, we amplify our success.

DAE Guiding Principles

- We are guided and inspired by UBC's purpose and vision,
- We strive to provide an exceptional stakeholder experience,
- We align alumni engagement and development to achieve sustainable success,
- We encourage creative ideas and innovative approaches,
- We recognize and celebrate the successes of our portfolio and team members,
- We value the diversity of our staff,
- We collaborate purposefully and pursue strategic partnerships,
- We invest in the development and professional growth of staff,
- We foster an inclusive, healthy, dynamic, and warm environment based on trust, respect, and care for each other.

ASSOCIATE DIRECTOR JOB SUMMARY:

The Associate Director is a key member of Okanagan DAE team, responsible for generating strategic prospect contact at the major gift level and raising an average \$1+ million annually. To do this, the AD will manage 75-150 prospects, and make 20-25 solicitations annually.

Reporting to the Director of Development, the Associate Director works in partnerships with senior management to facilitate maximum private and public sector support; develops and implements comprehensive and complex plans for identifying, cultivating, soliciting, and stewarding major gift prospects and donors and develops and manages a portfolio of major gift prospects and meets potential prospects on a one-on-one basis.

The AD will ensure appropriate donor recognition, acknowledgement and stewardship programs are in place and oversees the generation of donor/prospect solicitation materials and correspondence and will have some administrative responsibilities.

IDEAL SKILLS AND COMPETENCIES

The ideal candidate will have strong experience working in major gift programs, complex relationship management and revenue generation, as well as a thorough understanding of higher education fundraising. Strong interpersonal skills and the ability to plan and execute a variety of complex projects with a collaborative approach and outstanding written and oral communication skills.

To thrive in the Associate Director role, the ideal candidate will possess:

- Significant fundraising experience, with a record of progressive accomplishment and demonstrated ability in developing, implementing, and managing a donor pipeline.

- A proven track record of major gift success in a sophisticated and complex environment, ideally in post-secondary education.
- A highly collaborative nature, and the ability to lead, direct, and manage up and across.
- Exceptional communication and interpersonal skills, including the ability to translate complex information for various audiences, and to seek out needed information.
- Ambition and drive, a positive attitude, and a professional mindset.
- Curiosity, initiative and, enthusiasm for UBC Okanagan's work and the ability to find solutions where they may not be immediately apparent.
- Demonstrated knowledge of current and emerging trends in philanthropy.
- Demonstrated high level of political acumen and perception; acts with integrity, discretion, and tact.
- Skilled decision-making, including the ability to make decisions with the appropriate level of consultation and transparency expected in an academic institution.
- Ability to meet deadlines and manage competing priorities.
- Persistence and assertiveness to keep forward momentum and progress; proactive, and a strong inclination towards action.
- A post-secondary degree is strongly preferred, or an equivalent combination of education, training, and experience.
- Ability to travel both for local donor and alumnae meetings, as well as nationally and internationally as needed.

WORK PERFORMED

The Associate Director:

- Works in partnership with senior management to facilitate maximum private and public sector support for UBC Okanagan, with a Faculty/unit specific individual annual dollar goal;
- Develops and manages a portfolio of major gift prospects (75-150) making face-to-face visits (100-200 annually) for the purposes of discovery, cultivation, and solicitation strategies for prospects at the major gift level (defined as \$25,000 and up).
- Coordinates and attends face-to-face prospect/donor meetings, with an expectation to meet annual benchmarks for these meetings;
- Develops and implements a comprehensive plan for identifying, cultivating, soliciting, and stewarding major gift prospects and donors.

- Develops proposals and works with donors to generate gifts for priority projects.
- Develops and implements strategies for closing major gift solicitations, with an expectation to make solicitations (20-25 annually) at the major gift level;
- Ensures that appropriate donor recognition, acknowledgment and stewardship programs take place;
- Generates donor/prospect solicitation materials and correspondence.

FOR MORE INFORMATION & TO APPLY

To apply or learn more, please contact UBC Okanagan's search partner, Christoph Clodius at The Discovery Group, at christoph@thediscoverygroup.ca.

Deadline: All submissions should be received by May 19, 2023

Compensation, Perquisites and Flexible Hours: UBC's benefits plans are designed with the continuing health and wellbeing of our staff, faculty, and their families in mind. Examples of UBC staff benefits include a generous vacation package, extended health and dental coverage, a health spending account, enrolment in UBC's pension plan, tuition waivers on UBC courses, counselling, and family support services, and much more.

The Associate Director's compensation range is between \$87,340 and \$136,468, with a hiring target of \$109,175.

The incumbent is expected to be on campus a few days a week, with some flexibility based on the needs of the role and donor activity. While UBC Okanagan is based in Kelowna, the successful AD may also be based in a nearby Okanagan community such as Vernon or Penticton.

Equity: Equity and diversity are essential to academic excellence. An open and diverse community fosters the inclusion of voices that have been underrepresented or discouraged. We encourage applications from members of groups that have been marginalized on any grounds under the B.C. Human Rights Code, including sex, sexual orientation, gender identity or expression, racialization, disability, political belief, religion, marital or family status, age, and/or status as a First Nation, Metis, Inuit, or Indigenous person.

ABOUT KELOWNA

Location and Population

The sun kissed, laid back city of [Kelowna](#) is beautifully located on the eastern shore of Lake Okanagan, situated amongst the Cascade and Coastal Mountain ranges in southern British Columbia. The name 'Kelowna' loosely translates from [n̓syilxcən](#) (the indigenous [Syilx/Okanagan](#) peoples language) as 'male grizzly bear', perhaps a notional nod to the incredible natural world surrounding the city. Kelowna is the largest city in British Columbian Interior region, with nearly 220,000 residents. The city boasts four beautiful seasons and over 2000 hours of sunshine annually, making it the near perfect place to engage in world-class [skiing](#), [mountain biking](#), [golf](#), [hiking](#), and wine tasting. Nearby cities like Vancouver, Calgary, and Seattle are easily reached in under one hour, by way of the [Kelowna International Airport](#).

Recreation & Culture

Kelowna's location makes it the perfect gateway to the Okanagan Valley, a destination for great food and wine lovers. The longer, warmer growing season gives prominence to regions famed orchards, vineyards, and local organic farms, which has created a thriving 'farm to table' culture serving locals and tourists alike. Despite its diverse industries such as healthcare, tourism, agriculture and manufacturing, the city lays claim to over 200 parks and greenspaces as well as 20 vineyards within the limits of the city! The birthplace of BC winemaking, Kelowna is home to such notable wineries including: [Mission Hill Winery](#), [Martin's Lane Winery](#), [Quail's Gate](#) and [Fitzpatrick](#) Vineyards.



The city is a home to outdoor enthusiasts, where mountain biking or skiing after work is not unheard of. Known for some of the most beautiful beaches in Canada, Kelowna has 30 beaches along shore of lake Okanagan – known for its warm water for swimming and long stretches of sandy beach.

As a complement to the healthy lifestyle it encourages, Kelowna General Hospital (an affiliate of the faculty of Medicine at UBC) is the largest and best hospital in the interior.

Housing

Finding the right home in the right location in Kelowna is made easier knowing that no matter which neighborhood you live in, the average commute time is 20 minutes. The average price of a single-family, detached home is about 30% lower than metro Vancouver. Neighboring communities including West Kelowna, West Bank and Lake Country, also offer affordable housing options with easy, reasonable commutes.

APPENDIX 1: FORMAL JOB DESCRIPTION

1. Position Identification:

- ◆ Position Classification: Development Office, Level D, Pay Grade 11
- ◆ Position Title: Associate Director
- ◆ Division: Development
- ◆ VP: VP of Development & Alumni Engagement

2. Job Summary:

This fundraiser position is responsible for generating strategic prospect contact at the major gift level. The Associate Director is responsible for managing a defined development program at an average \$1.5+ million level, or resource development activity at an average \$1+ million annually. Responsible for managing a minimum of 75-150 prospects, making 20-25 solicitations, and raising a minimum average of \$1+ M annually.

The Associate Director works in partnerships with senior management to facilitate maximum private and public sector support; develops and implements comprehensive and complex plans for identifying, cultivating, soliciting, and stewarding major gift prospects and donors and develops and manages a portfolio of major gift prospects and meets potential prospects on a one-on one basis. The position will ensure appropriate donor recognition, acknowledgement and stewardship programs are in place and oversees the generation of donor/prospect solicitation materials and correspondence and will have some administrative responsibilities.

3. Organizational Status:

Reports to: One of: Director of Development, Senior Director/Assistant Dean or Executive Director of Development.

Works with: UBC faculty and staff involved in fundraising including the VP, Development and Alumni Engagement, AVP Development, the President of the University, and other senior administrators as appropriate.

Contacts: Donors and outside community groups and organizations.

Supervises: Normally Associate Directors do not have direct supervisory responsibilities but may mentor junior development staff.

4. **Work Performed:**

- Works in partnership with senior management to facilitate maximum private and public sector support for the University, with a Faculty/unit specific individual annual dollar goal;
- Develops and manages a portfolio of major gift prospects (75-150) making face-to-face visits (100-200 annually) for the purposes of discovery, cultivation, and solicitation strategies for prospects at the major gift level (defined as \$25,000 and up). Responsible for coordinating and attending face-to-face prospect/donor meetings, with an expectation to meet annual benchmarks for these meetings;
- Develops and implements a comprehensive plan for identifying, cultivating, soliciting, and stewarding major gift prospects and donors. Responsible for management of a portfolio of relationships;
- Develops proposals and works with donors to generate gifts for priority projects. Develops and implements strategies for closing major gift solicitations, with an expectation to make solicitations (20-25 annually) at the major gift level;
- Ensures that appropriate donor recognition, acknowledgment and stewardship programs take place;
- Generates donor/prospect solicitation materials and correspondence;
- Performs other related duties as required.

5. **Consequence of Error/Judgement:**

The position is a critical point of contact for donors and university staff in relation to development activities. The Associate Director is expected to make decisions and recommendations impacting a total development goal. Incorrect interpretation or communication of university policy and procedures or lack of tact, diplomacy, or sensitivity in dealing with major donors and senior administrators could potentially result in damaged relationships and credibility, leading to the potential loss of these donations.

This position is also critical in advising and ensuring proper interpretation and implementation of academic and fiscal policies for fundraising, senior administrators, and development staff. The Associate Director is responsible for a portfolio of donors and prospects, as well as for an individual goal per annum. If inappropriate advice, incorrect interpretation, or improper financial analysis were conveyed to major donors or senior university administrators, millions of dollars could be incorrectly administered or unavailable for disbursement. UBC could be in direct violation of stewardship and trusteeship obligations to donors and for funds received through bequests.

The incumbent participates in decisions concerning the planning, organization and utilization of staff, staff selection and job performance reviews.

6. Supervision Received:

The incumbent works under general direction according to broad objectives. Works independently with discretion relating to donor negotiations, policy administration and interpretation, and administrative responsibilities. Overall strategic planning on global fund-raising initiatives is executed in consultation with manager.

7. Supervision Given:

Normally Associate Directors do not have direct supervisory responsibilities but may mentor junior development staff.

8. Minimum Qualifications & Skills:

Education: Minimum of an undergraduate degree in an applicable discipline; and a graduate degree and/or an undergraduate degree in commerce, marketing or economics is preferred.

Experience: A minimum of five years' related experience or an equivalent combination of education, training, and experience. Proven experience in Major-Gift fundraising and skilled in strategy development. Thorough knowledge of the University environment and academic structure is preferred. Experience working with a centralized fundraising system an asset.

Skills: Ability to work independently while exercising good judgement at all times. Well-developed analytical and problem-solving skills are required, along with strategic thinking and skills in conflict resolution. Strong conceptual abilities combined with high attention to detail. Ability to work simultaneously on a variety of complex projects with imposed deadlines; ability to formulate strategic plans; effective communication skills, verbal and written; strong interpersonal and negotiation skills required in liaising with major donors, corporate executives, and senior university administration; proven ability to work with the University's senior-most donors to advance the University's mission; tact, diplomacy, discretion, and sound judgment required.

The incumbent should have the ability to plan, coordinate and supervise the work of others, in order to execute a variety of complex projects with imposed deadlines. Computer experience required; MS Windows environment, Microsoft Office preferred.