

ADVANCEMENT 101

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May 26, 2026



UNIVERSITY OF
WATERLOO

UNIVERSITY OF WATERLOO

our mission

We inspire and engage people in philanthropy to advance the University of Waterloo in becoming one of the world's top innovation universities.

four Ts of philanthropy



TIME



TREASURE



TALENT



TESTIMONY

we are a registered charity: philanthropy vs. charity

CHARITY



- Responds to immediate need.
- Is important for building community.
- Examples: giving to Student Wellness fund, food banks or disaster relief.

PHILANTHROPY



- Aims to address root causes of social issues and create lasting impact.
- Involves strategic planning and investments in programs, research and innovation.
- Examples: creating endowments for scholarships, funding research to fight disease, etc.

our mission in action



We inspire and engage our
263K+ alumni worldwide

78K+ are Grads of the Last Decade
(GOLDs)



We build Waterloo champions and
strategic partnerships

We work with our peers in University
Relations to build recognition that helps
to shape the university's reputation and
image



We develop and build relationships
internally and externally to increase
philanthropic support

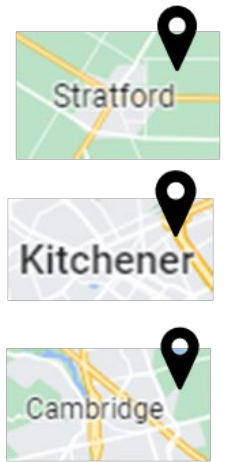
one advancement team

120+ Advancement Professionals

Embedded across our main campus and satellite campuses

Work closely with our senior leaders and academic leaders who set the priorities

Share goals and processes for collaboration, mentorship and people-first service



THE FRONT-FACING PART OF OUR WORK

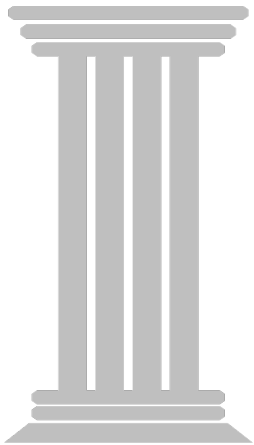
engagement, fundraising, communications



four pillars of engagement

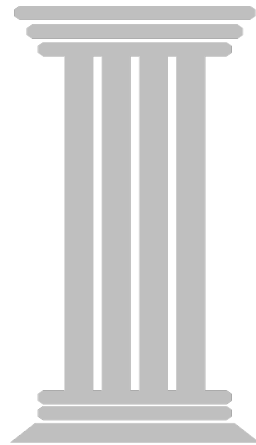
COMMUNICATIONS

Interactive, meaningful and informative communication with alumni.



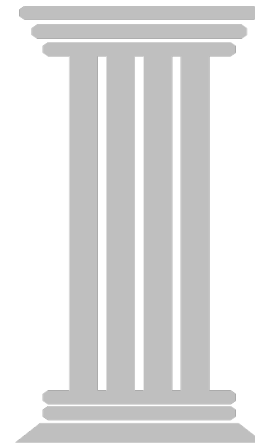
EXPERIENTIAL

Meaningful experiences that inspire alumni and are valued by the institution.



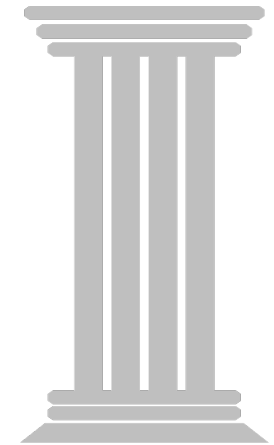
PHILANTHROPIC

Diverse opportunities for alumni to make meaningful philanthropic investments.

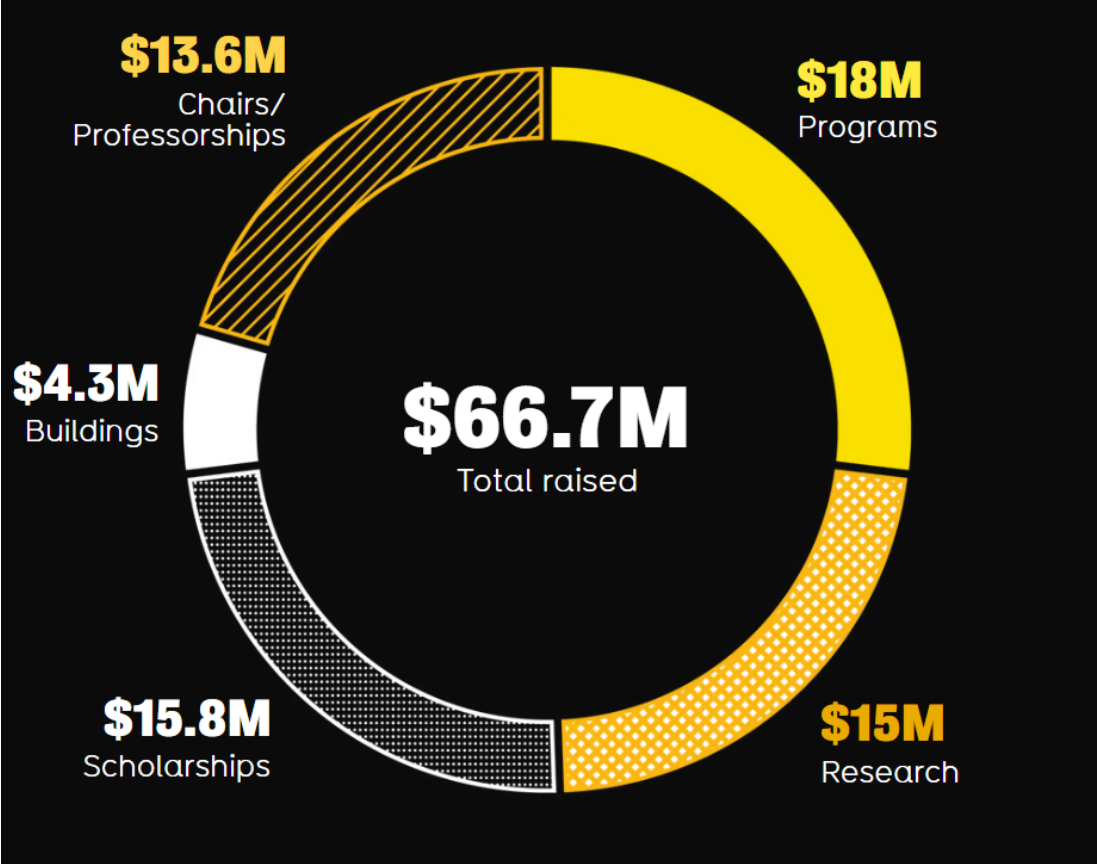


VOLUNTEERING

Formally defined, rewarding volunteer roles that are endorsed by the institution.



2024-2025 report on giving data




These figures represent dollars RAISED and include cash, pledges, gifts-in-kind and other revenue promised or given May 1, 2024 to April 30, 2025. Figures exclude payments on pledges made prior to the current year. All figures are unaudited.

877 individually named endowments

21 new endowments established in 2024/2025

6,646* donors in 34 countries

*Figure does not include the thousands of students each year who make voluntary contributions.

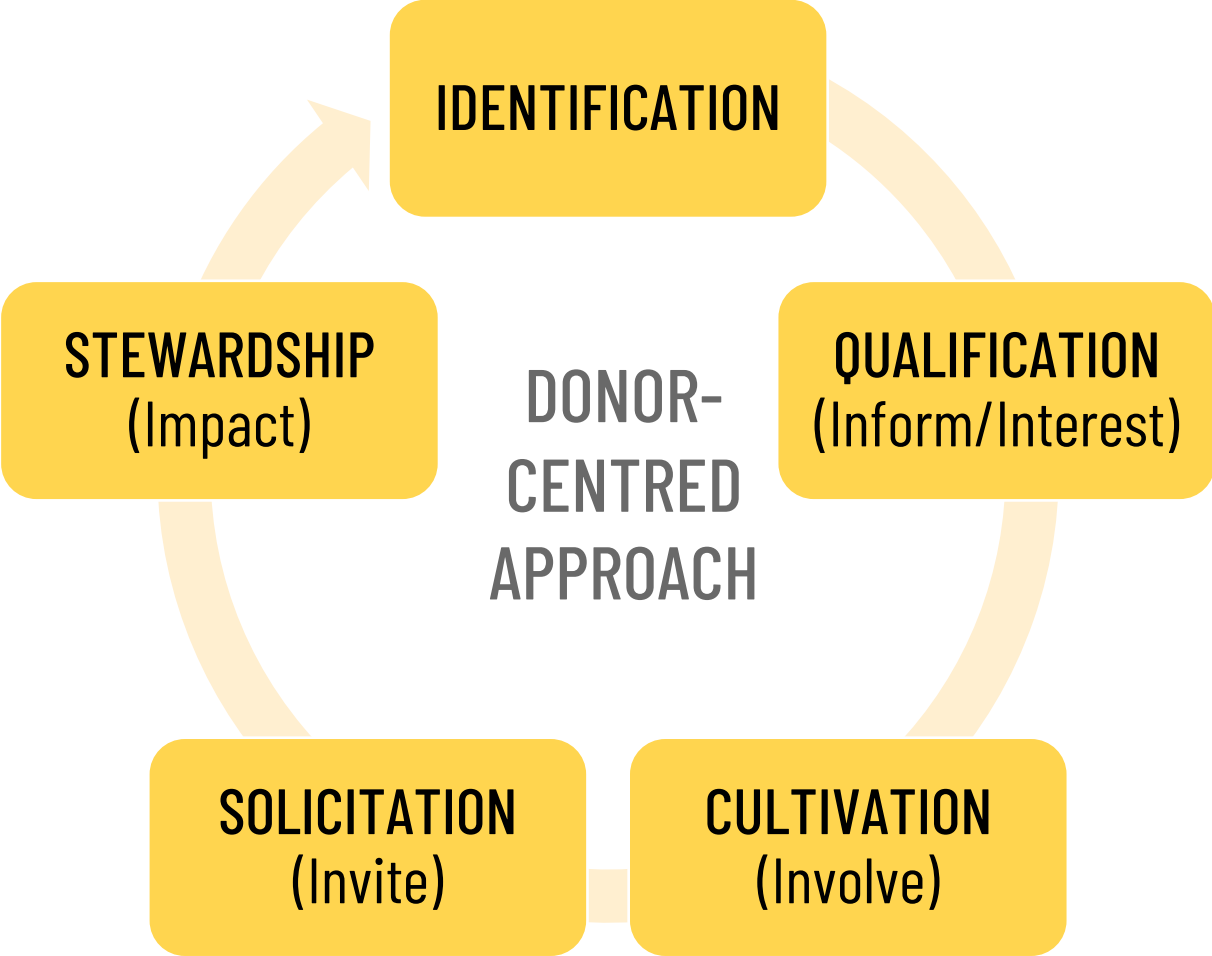
 [Read the 2024-2025 Report on Giving](#)

types of giving

GIVING PROGRAM

Annual Giving	<ul style="list-style-type: none">• Broad donor base with gifts from \$1 to \$9,999• Reliable financial support throughout the year for key University priorities. An important program to be aware of is our Faculty, Staff and Retiree (FSR) program
Leadership Giving	<ul style="list-style-type: none">• Bridges the gap between annual giving and major gifts.• Donors' contributions are usually larger than the average annual giving donation.• Gifts from \$10K to \$99,999
Major Gifts	<ul style="list-style-type: none">• Focuses on cultivating relationships with individual donors who have the capacity and interest to make significant financial contributions (\$25,000+). All Faculties, Schools, AFIWs and ASUs have Major Gift Officers.
Planned Giving	<ul style="list-style-type: none">• Donations designated to the University at a future date, often through a will, trust or from a donor's estate
Principal Giving	<ul style="list-style-type: none">• Focuses on individuals, foundations, or corporations who make large, often transformative donations (\$1M+) used to fund major initiatives, capital projects or endowment funds
Corporate Sponsorships	<ul style="list-style-type: none">• Financial or in-kind support of an event, initiative, or project with corresponding promotional benefits such as marketing or brand visibility

keeping donors at the centre of everything we do



MOTIVATION

Deep engagement with the cause and its people.

Personal engagement with the University and its vision for impactful change.

Seeing their giving advancing humanity's most pressing challenges (donor's personal story and their passion).

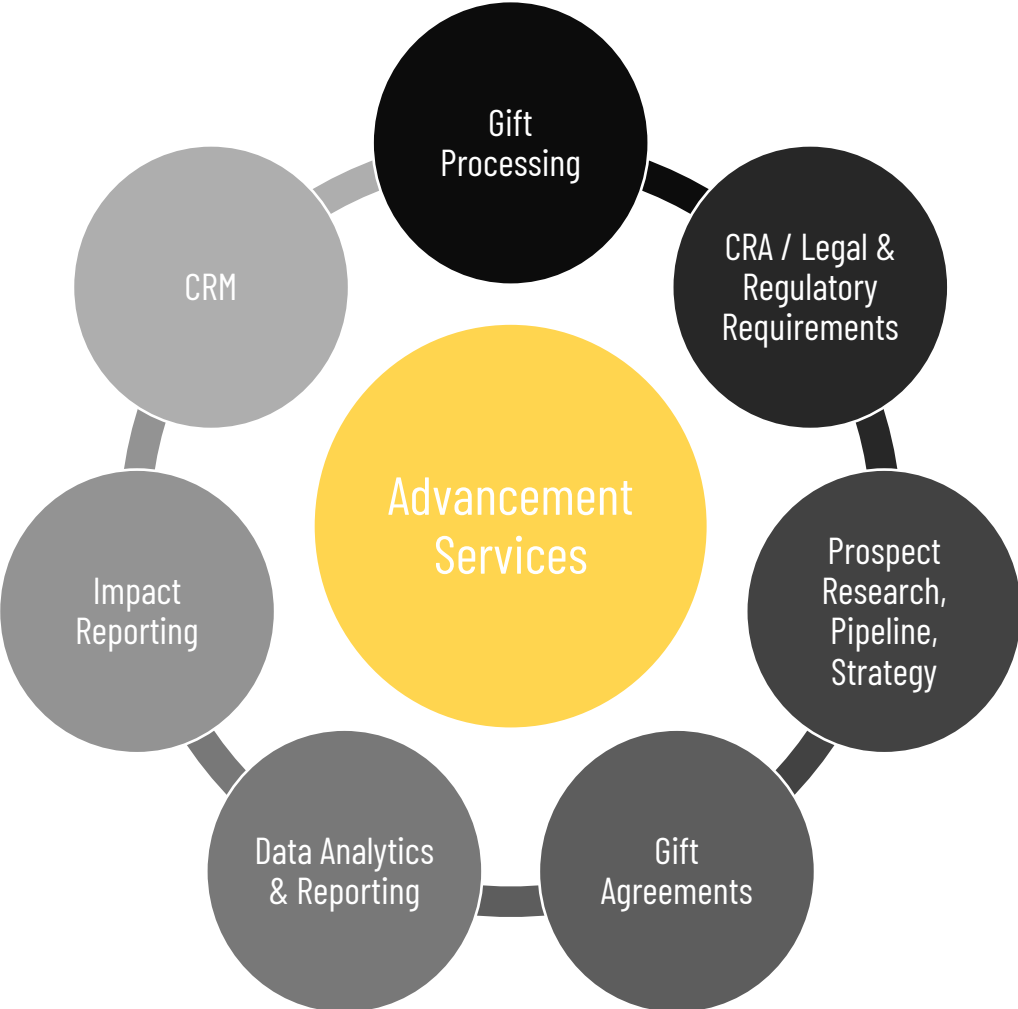
Relationships, experiences and stewardship that are exceptionally attentive, thorough and personalized.

THE BEHIND THE SCENES WORK

advancement services



advancement services



ENABLING THIS WORK

our champions, colleagues, and partners



we don't do this work on our own



Your role and partnership is critical



Strategic
Connectors



Relationship
Builders



Credible
Advocates



Create
Pathways for
Engagement



Deliver and
Report on
Donor Commitments

dispelling the myths ...

What Advancement isn't

- An ATM
- Party planners
- Perpetual coffee drinkers
- Decider of fundraising priorities
- Only out for money

What Advancement is

- Matching donor interests with priorities
- Facilitating engagement opportunities
- Coffee...with purpose
- Assess fundraising feasibility of priorities; help convene
- Long-term view of relationships; people advance the institution through not just philanthropy.

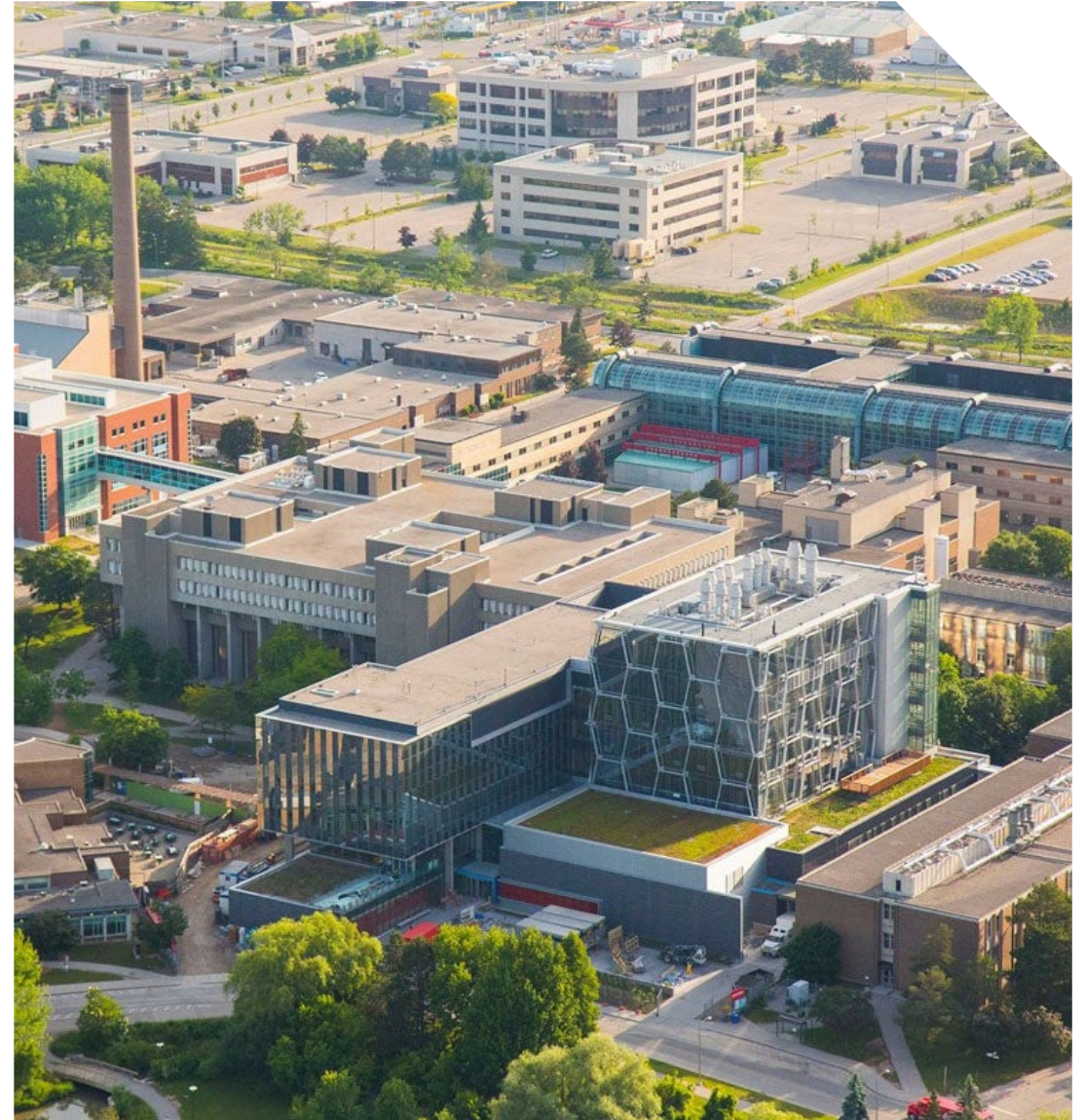
THE UW ADVANCEMENT JOURNEY

since 2022



the vision

- Breaking down silos
- Building a high performing team
- Entering campaign
- Building to \$100M annually



strategic reset: four key pillars

Trust

credibility,
collaboration,
partnership, people

Alignment

Resources and
institutional vision

Discipline

rigor,
focus,
intention

Data

capturing it;
leveraging it

TRUST

credibility; collaboration; partnership

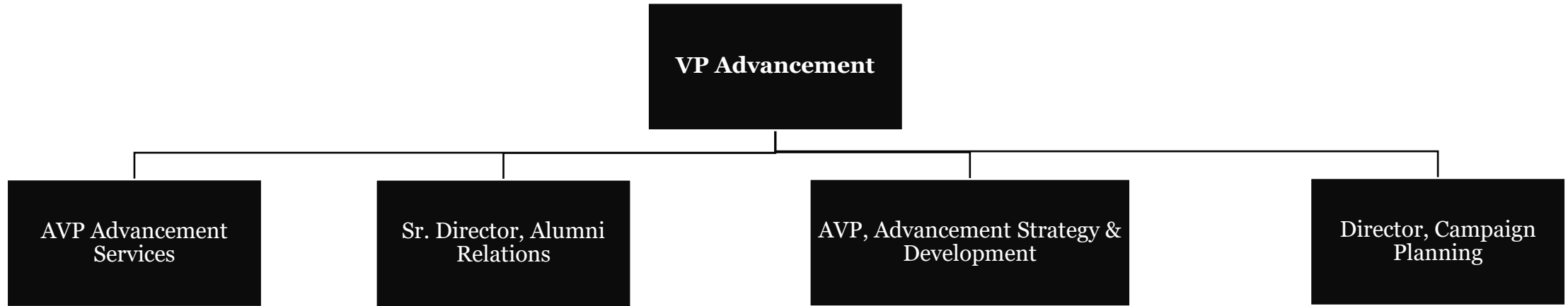


2022: discovering & building to One Advancement

- **Challenges** – in midst of post-covid re-set, false start(s) to campaign over previous 5 years, problematic "Advancement Framework"
- **Listening tour** – cross-campus exploration exposed scarcity mindset and distrust among colleagues, but also highlighted a shared purpose and understanding of the need for change
- **One Advancement** – Identified the framework for *One Advancement*; one unified team focused on efficiency, collaboration and true, donor-centred strategies



Advancement: Jan 2022



Advancement:

Jan 2022

Fall 2022

Dec 2022

May 2026

VP Advancement and External Relations

AVP Development Programs

AVP Engagement

Senior Director, Principal Giving

Director, Advancement Strategy

Director, Strategic Initiatives

AVP Marketing and Brand Strategy

AVP Communications and Institutional Relations

AVP Community Relations & Events

UNIVERSITY OF WATERLOO



FACULTY OF SCIENCE

Director, Advancement

UNIVERSITY OF WATERLOO



FACULTY OF ENGINEERING

Director, Development & Alumni Relations

UNIVERSITY OF WATERLOO



FACULTY OF ENVIRONMENT

Director, Advancement

UNIVERSITY OF WATERLOO



FACULTY OF HEALTH

Director, Advancement

UNIVERSITY OF WATERLOO



FACULTY OF MATHEMATICS

Director, Advancement

UNIVERSITY OF WATERLOO



FACULTY OF ARTS

Director, Advancement

UNIVERSITY OF WATERLOO



FACULTY OF ARTS

Director, Major Gifts

ALIGNMENT

resources; institutional vision



building alignment: institutionally

- Campaign rooted in our Waterloo at 100 vision and Global Futures
- Campaign priorities fleshed out under institutional vision
- Campaign brand expression to be that of the university
- Alumni Relations programming aligned to global futures

◀ GLOBAL FUTURES ▶

SOCIETAL



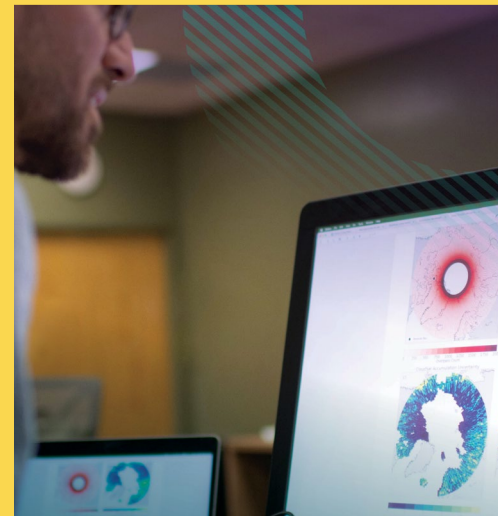
HEALTH



SUSTAINABLE



TECHNOLOGICAL



ECONOMIC



DISCIPLINE

rigor; focus; intention



developing discipline: time spent fundraising

In F23, fundraisers reported on average, 47% time spent fundraising.

Barriers included:

- Administrative demands
- HR responsibilities
- Inefficient / time consuming processes
- Non-Advancement related tasks



Desired State: 78% time spent fundraising
we need YOUR help to enable this!

developing discipline: shared goals & tools to support

Shared Goals

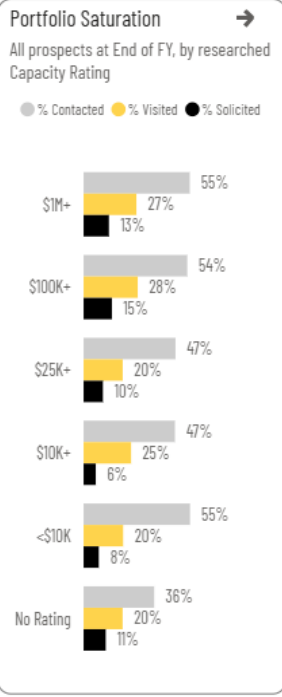
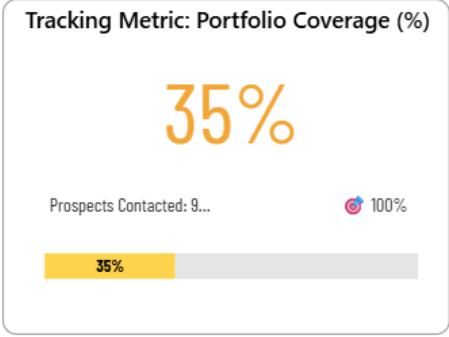
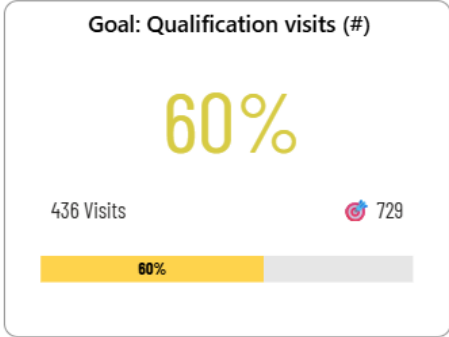
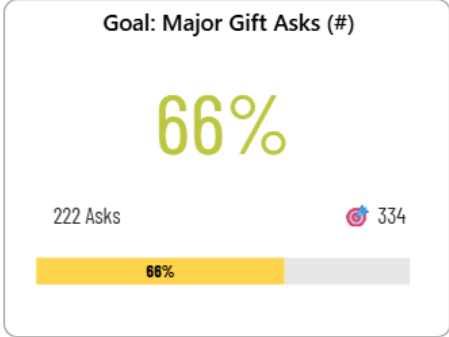
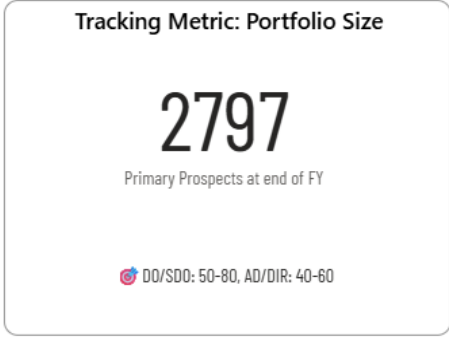
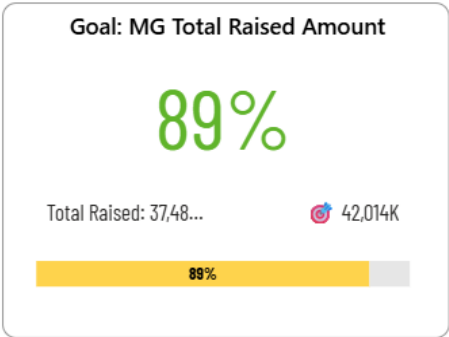
- Informed by position, portfolio, time in role etc.

Fundraiser Dashboard

- To measure real-time progress and identify opportunities

Campaign Pipeline Strategy Sessions

- To support long-term strategy and continued movement with key prospects



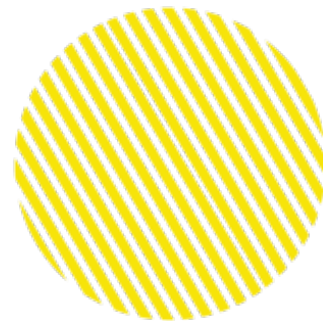
DATA

capturing it; leveraging it



capturing & leveraging data

- Historic lack of trust = lack of data sharing
- Trust, alignment, discipline – is helping to change this
- Better data helps us to better know and serve our alumni and donors
- Better data helps us measure our progress & benchmark
- Move to new CRM is also creating the conditions for change



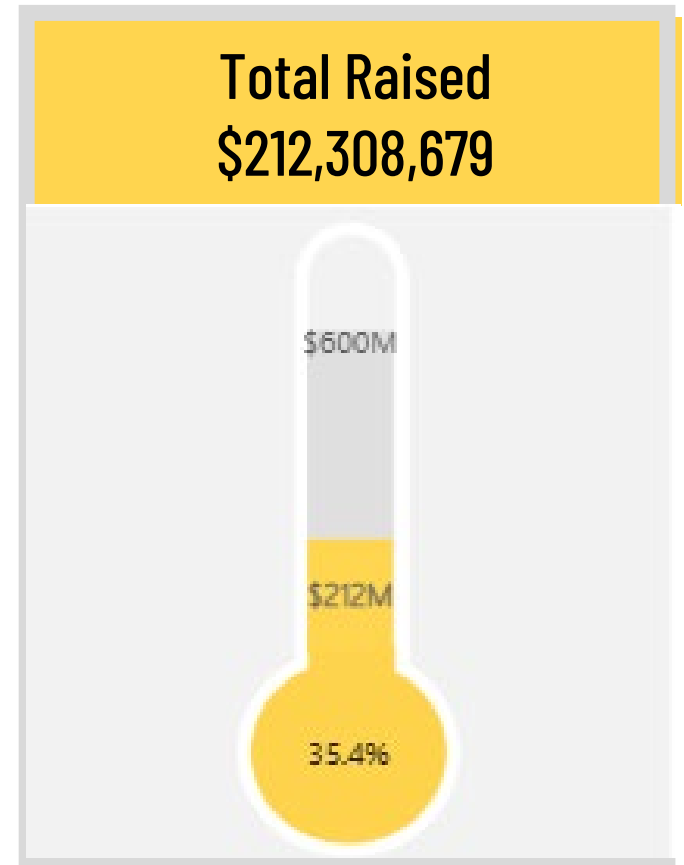
WHERE WE'RE AT

and where we're going



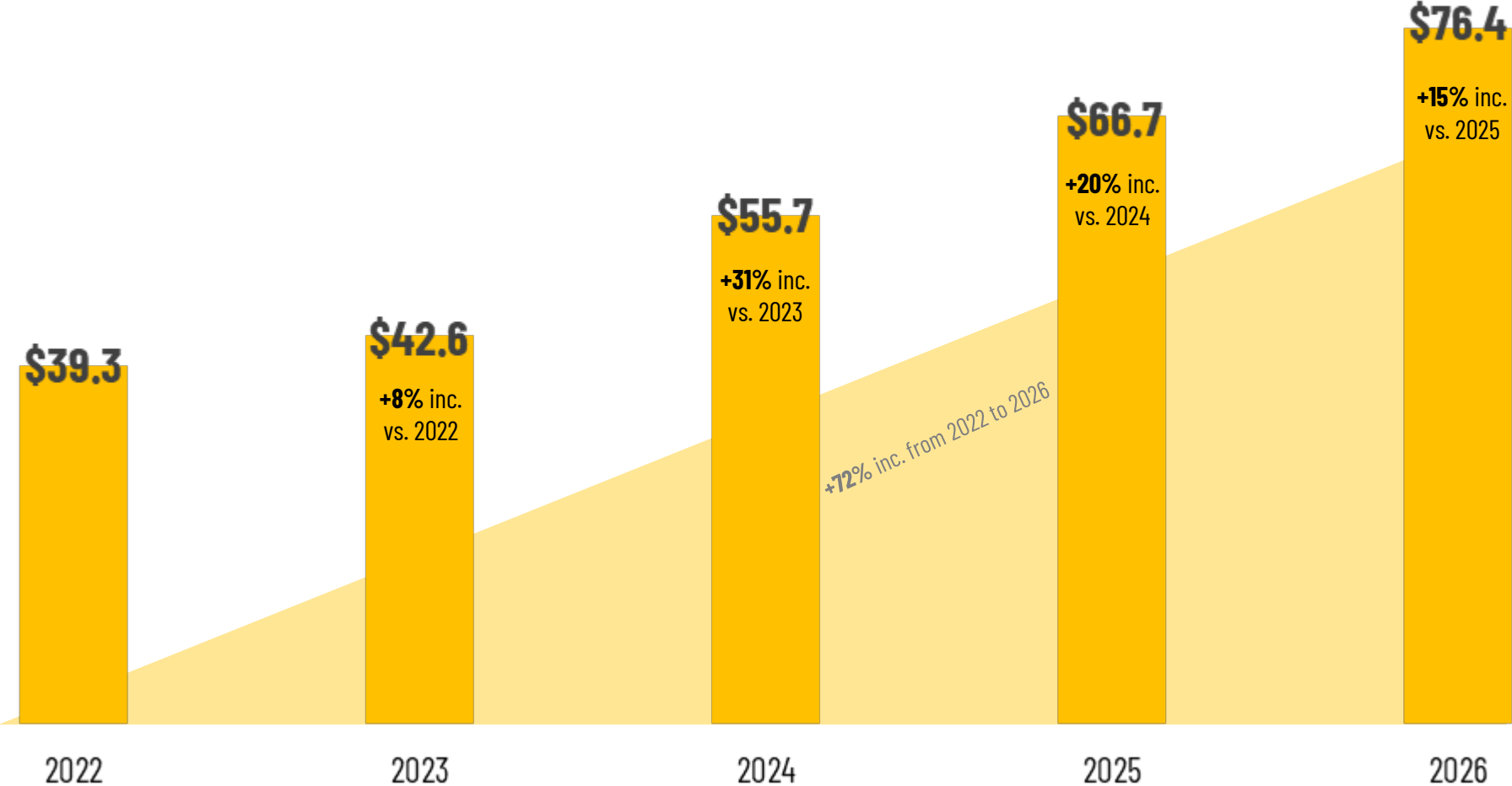
in campaign, for real this time!

- Rooted in the Waterloo at 100 vision and the Global Futures
- **Campaign Goals**
 - **Fundraising** \$600 million working goal; capacity building campaign
 - **Community** deepen engagement with our communities
 - **Reputation and Pride** continue to elevate our reputation and build pride among our base
 - **Waterloo Culture** build out a culture of philanthropy and further the integration of Advancement across the University
- Quiet phase began May 1, 2023; focusing on Health Futures first



this isn't Advancement's campaign... this is the university's campaign

revenue growth



evolving our approach to engagement

- Alumni & Donor Experience team
 - Engaging alumni and donors through personalized and automated one-on-one outreach
- Giving Day
 - Moving away from Giving Tuesday to stand out with our own, UW Giving Day
- National Philanthropy Day
 - Thank-a-thon

All, with a long-term view to build a culture of philanthropy

remain grounded in four key pillars

Trust

credibility,
collaboration,
partnership, people

Alignment

Resources and
institutional vision

Discipline

rigor,
focus,
intention

Data

capturing it;
leveraging it

DEFINING A PHILOSOPHY OF PHILANTHROPY

the love of humankind



fundraising is the servant of philanthropy

- Giving is a privilege, not a nuisance or a burden. Thoughtful philanthropists see themselves as responsible stewards of life's gifts to them. Giving is an expression of thankfulness for the blessings that they have received during their lifetime.
- The person seeking the gift should never demean the asking by clothing it in apology.
- The first task of the solicitor is to help the potential contributor understand the organization's case, especially its statement of mission.

Source: Henry A. "Hank" Rosso, author, *Achieving Excellence in Fundraising* and, founder, the Fund Raising School at the Lilly Family School of Philanthropy at Indiana University.

substitute pride for apology

- “Those who do not believe in the values being promoted by the case for support, those who see fund-raising as an end in itself, risk seeing fundraising as begging.”
- “Those who do not believe that the beneficiaries are worthy of support risk mistaking fundraising for being about the money rather than the cause.”
- “Those who do not understand that giving and volunteering bring joy to donors and volunteers may see fundraising as diminishing others, as taking something away, or as getting people to act against their better judgement.”

Source: *Achieving Success in Fundraising*, 5th Edition

sharing your gift story

- Think about a time when you made a financial contribution. It could be big or small.
- Share with your colleague the nature of the gift, its intended purpose, and the beneficiary.
- What caused you to make this gift?
- How did you feel after you made the gift?
- What was it about the gift that reflects your values?
- Did you learn about the impact of the gift?

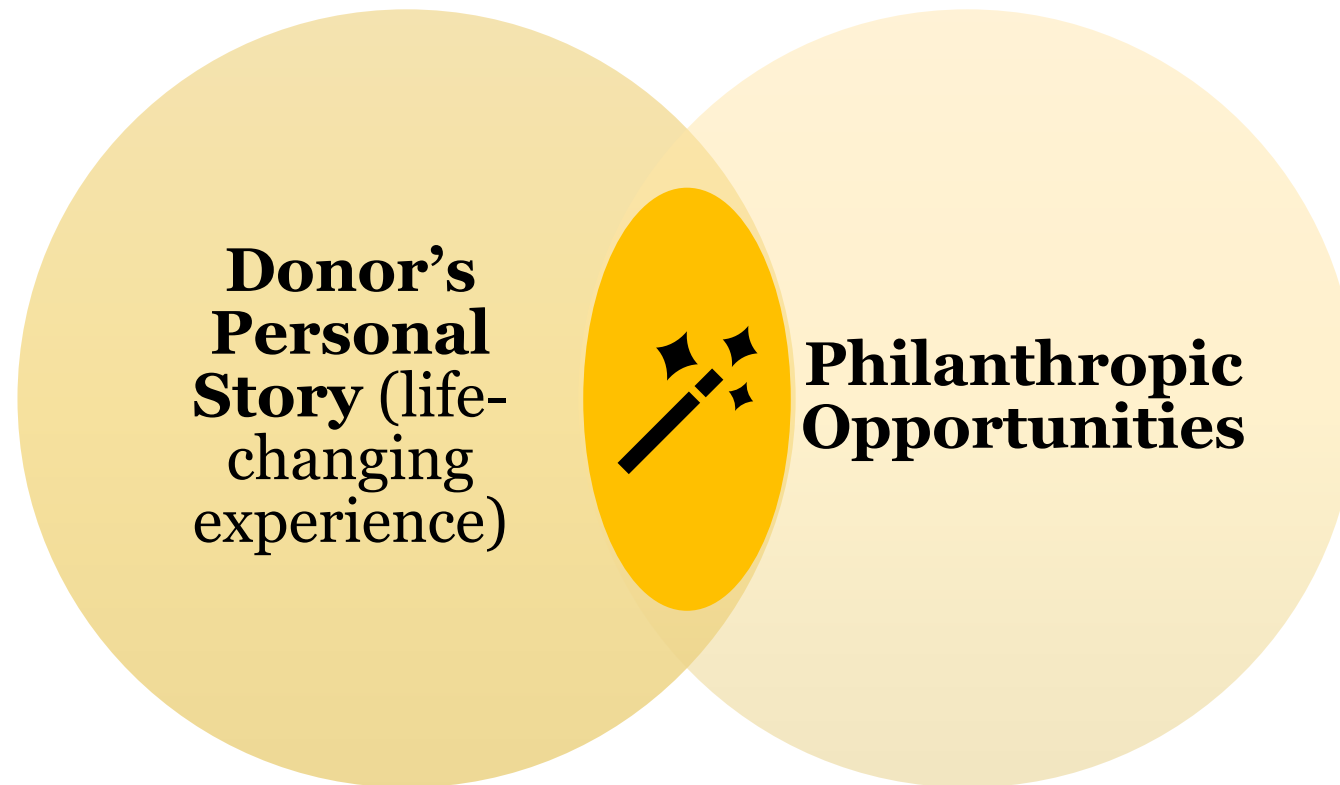
CHARACTERIZING PHILANTHROPY AS AN

EXCHANGE OF VALUES



donor development magic

when the donor's personal story connects to a philanthropic opportunity (program, project, or cause)



the language of a meaningful exchange of values

- Ought To
- Loyalty
- "Gift"
- Money
- To UWaterloo
- Transactional

VS

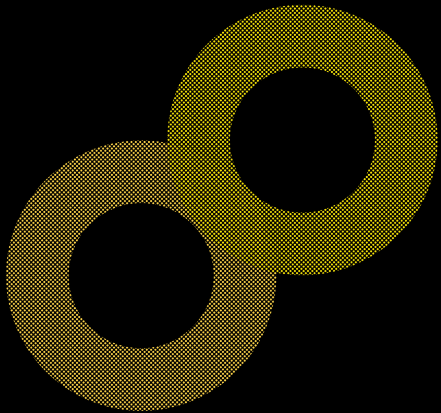
- Deeply Meaningful
- Passion
- "Investment"
- Meaning
- Through UWaterloo
- Transformational

Donor A gives to UWaterloo because are part of the alumni association and enjoy the tax benefits of their philanthropy.

Donor B gives to UWaterloo because an advancement professional explored their passions and interests, learned about a life-changing, deeply personal experience, and offered a way for them to support their passions *through* the university so they see a lasting impact (or return on their philanthropic investment) for the issue that so affected them or their loved ones.

IDENTIFYING THE ROLES OF THE ADVANCEMENT TEAM

role clarity



the role of the major gifts officer

- Use your time wisely, asking you to do what they cannot do for themselves.
- Build and facilitate relationships between prospective donors and the institution/dean
- Develop a prospect strategy for each prospect within his/her portfolio
- Enable the productive engagement of internal (academic, administrative professionals) and external volunteer partners in the cultivation and solicitation process
- Organize and build collateral for a variety of gift opportunities, shaped and defined by internal priorities and external donor interests
- Ensure the establishment and refinement of stewardship plans for prospects
- Make the ask, as appropriate

DEFINING THE ROLE OF ACADEMIC LEADERSHIP IN ADVANCEMENT

key partners



the role of academic leaders: forming the narrative

- What will transform us? What can we do best? What will differentiate us?
- What are your top three fundraising priorities?
- Are you overtly linking philanthropy to your strategic direction?
- What can philanthropy do that no other resource can?

the role of academic leaders: intentional partnership

IDENTIFICATION

Surface prospects from your networks

Identify alumni, parents, research partners, collaborators, and community leaders who show affinity and capacity.

QUALIFICATION

Lead high-value discovery conversations

Listen 70% Talking 30%

Early conversations where the goal is learning, not asking

Surface insight related to interest, capacity, readiness, fit

CULTIVATION

Create meaningful engagement opportunities

Invest in building personal and institutional relationships
Deepen prospect awareness of your faculty and programs through structured engagement
Translate complex research into clear, compelling stories of impact that build trust.

STEWARDSHIP

Sustain the relationship & long-term partnership

SPEND THE DONOR'S GIFT

Make impact visible and keep donors involved in the results of their giving

EXPRESS GRATITUDE

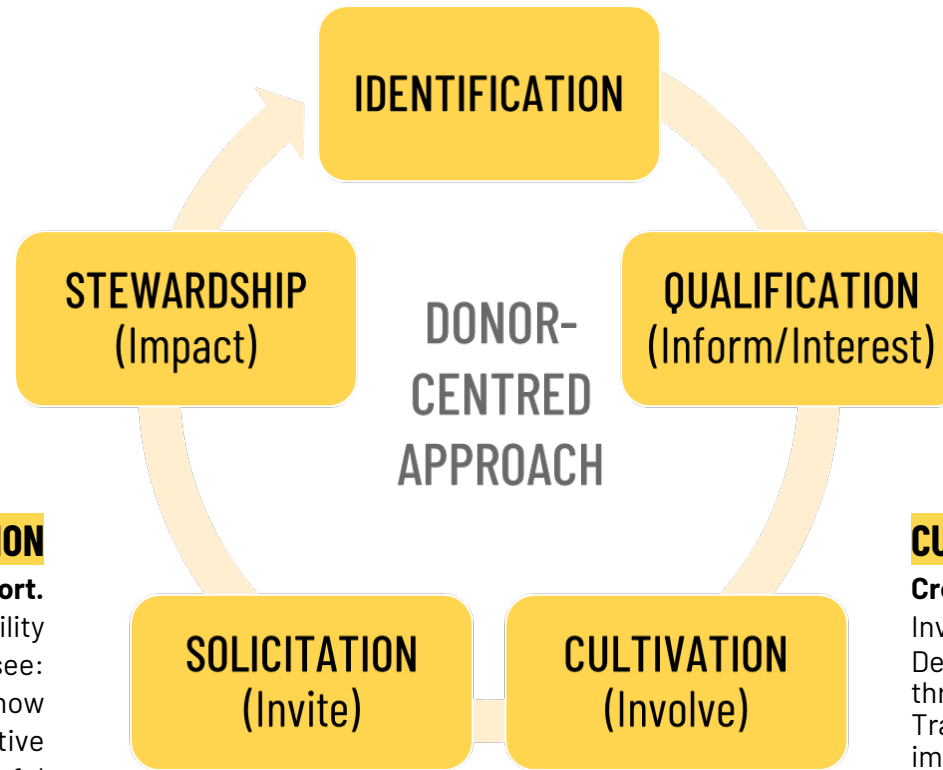
SOLICITATION

Co-create an impact-driven case for support.

Use your voice to inspire confidence and possibility

Help the donor see:

- Why this matters now
- Why this initiative is distinctive
- Why their involvement is meaningful



DETERMINING DONOR MOTIVATIONS



behavior patterns of high net-worth individuals

- The aspiration to create a lasting positive impact unites wealthy individuals.
- When asked about their reasons for giving, all generations are motivated by making a lasting impact (63% younger vs. 69% older).
- Older respondents are more than twice as likely to be driven by a sense of obligation (56% older vs. 25% younger), as well as feeling the need to respond to an urgent issue (35% vs. 23%) and their faith traditions (31% vs. 23%).

Source: 2024 Bank of America study. Net assets of \$3M+

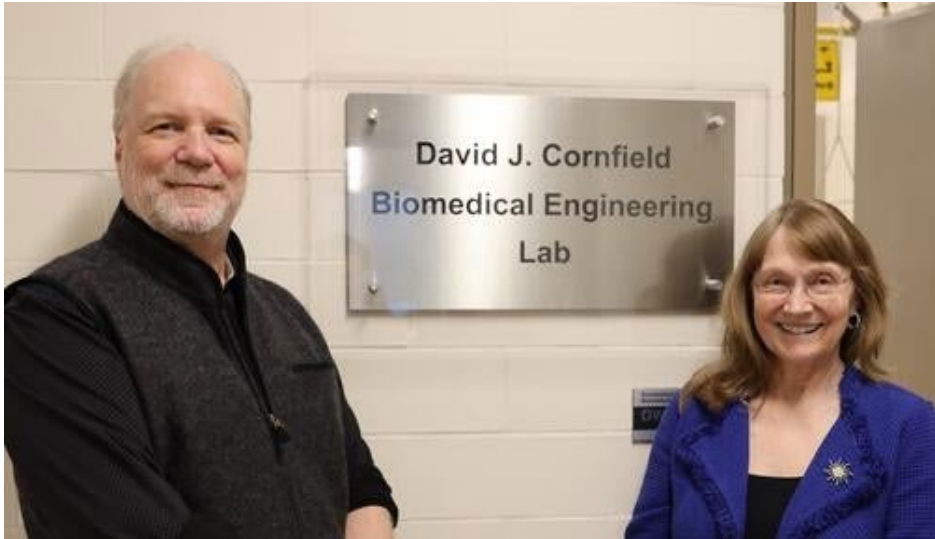
typical first time 7-figure alumni donor

- Average number of gifts prior to first 7-figure gift: 30+ gifts
- Average number of years between first gift and first 7-figure gift: 21.9 years
- Median first gift of subsequent 7-figure gift donor: \$100
- Average age at time of first 7-figure gift: 55 to 74 years
- Direct correlation between engagement with the institution and giving behaviour
- Alumni donors engaged 3 or more times give at rates 8 times higher than alumni donors not otherwise engaged

commonalities across principal gift donors

- Broad engagement with **multiple** units
- **Multiple relationships with leaders** – academic, administrative, volunteer
- Significant gift support to **multiple units**
- Principal gifts (\$5M+) typically made **after decades of involvement**
- **Principal gift donors** are usually active volunteers
- **Strategic gifts** to University priorities because they are **insiders**

what motivates donors of large gifts to give again?



- Deep engagement with the cause and its people
- Personal engagement with the institution, its key stakeholders and its critical challenges
- See their giving advancing a strategic response to institution's most pressing challenges
- Deep resonance between donor's personal story, donor's passionate cause and how the gift can advance that cause
- Multiple touchpoints and stakeholders
- The experience of extraordinary stewardship

DEFINING THE COMPONENTS OF A COMPELLING GIFT PROPOSITION

questions donors want answered



what would you ask before giving \$10M?

If you had \$10M to gift, what would be important to you?

- What questions might you ask of the academic leader?
- What questions might you ask of the leadership?
- What questions might you ask of the fundraiser?

Source: 2024 Bank of America study. Net assets of \$3M+

component parts of a compelling gift proposition

Vision
Context
Challenge
Why Waterloo
Why Now
Financial Requirement
Leadership
Impact
Stewardship

what constitutes a compelling gift idea?

...Questions donors want answered

The Vision

- What will transform you?
- What can you do best?
- What will differentiate you?

The Context

- Why is this initiative so important?
- How does it align with institutional priorities?

The Challenge

- What societal challenge would this solve?
- What impact would a solution have outside academia?

Why Waterloo?

- How is your approach new or unique?
- What strengths can you tap into?
- How is it different from competing programs?

Why Now?

- What is urgent about this initiative?
- Who is waiting for the impact?

Financial Investment

- What is the rationale and cost for each element?
- Will donor funds leverage additional funding?

The Leadership

- Who will lead and why?
- Where does the money reside?
- Who administers it?

The Impact

- What does success look like?
- What are the key deliverables?
- What is the implementation timeline?

Stewardship & Recognition

- What is the plan for continued engagement?
- What are the annual success metrics?

FINAL REFLECTIONS



THE ROLE OF ACADEMIC LEADERS: INTENTIONAL CULTIVATION

- Commit time and patience to building personal and institutional relationships with a set of top prospects
- Ask good questions to discover the prospect's personal values, professional interests, family dynamics, and financial resources
- Strengthen each prospect's awareness and knowledge of your faculty and programs through formal structures of engagement
- Along with your Advancement colleagues, determine the viability of the individual as a bona fide prospect.
- Listening 70%/Talking 30%
- Use your 30% to tell stories of philanthropic impact

a few final reflections

- Advancement supports the academic mission.
- Alumni are our best brand ambassadors.
- Relationships are at the core of what we do. We are in it for the long-term.
- Trust is paramount.
- Advancement (and Campaign) is far more than the dollars raised.
- Advancement requires everyone.
- We take a donor-centred approach to our work.
- Supporting and engaging with UW is entirely voluntary.
- Faculty and internal champions are essential partners.

discussion

- How would you describe your role in the fundraising effort and how much time are you currently spending on fundraising?
- Where do you see yourself adding the most value?
- What steps can you take to help build a “culture of philanthropy and accountability”?
- What did we miss?
- What do you want to know more about?