

Job Description

Job Title:	Senior Stewardship and Agreements Officer
Department:	Office of Advancement
Reports To:	Associate Director, Stewardship and Donor Relations
Jobs Reporting:	None
Salary Grade:	USG 10
Effective Date:	May 2021

Primary Purpose

This position contributes to strong and lasting relationships with donors, and ensures consistent, sustainable and transparent practices. The Senior Stewardship and Agreements Officer provides direction to fundraisers and management, and oversight of the programs, processes and preparations to establish and amend gift agreements, report on gifts, and advise on University of Waterloo naming opportunities.

Key Accountabilities

Review of All New and Amended Gift Agreements

- Provide expertise and assistance to fundraising staff as they prepare gift agreements to ensure they meet donor needs, UW priorities, CRA guidelines, human rights guidelines and other administrative and legal requirements
- Review gift agreements for consistency, clarity and manageability as well as for adherence to internal policies and external requirements
- Work with Grad Studies and Postdoctoral Affairs (GSPA), Student Awards and Financial Aid (SAFA) and Finance to review agreements and seek guidance on matters within their areas of expertise
- Monitor and manage tracking system for gift agreement review
- Provide policy and procedural guidance on process, content, and distribution

Oversight and Management of Gift Agreement Templates and Supporting Process Documents

- Work with UW experts in Secretariat, Finance, GSPA, SAFA etc., and internal partners to prepare and maintain a system of templates, forms, and processes to aid in navigating, preparing and amending gift agreements
- Ensure consistent and manageable procedures for fundraisers, and adherence to University of Waterloo policy and procedures

Financial Reporting of Annual Endowment and Non-Endowed Processes for Donors

- Provide oversight and functional supervision to staff involved in the administrative support and production of annual endowment and select trust stewardship reports
- Assign, monitor and oversee the gathering of, manipulation of, and production and distribution of reports to donors and custodians from multiple sources of data
- Maintain working relationships with GSPA, SAFA, and Finance staff for data requests and fund research
- Manage coding requirements and develop practices for endowed and non-endowed donations for reporting purposes in Raiser's Edge database
- Work with Faculty Advancement teams to ensure accurate, current, transparent and professional presentation of data and inclusion of supplementary materials

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- Collaborate with Donor Relations and Stewardship team to strategize and develop stewardship communications for endowments and special funds (e.g. annual package, FAQ, Chair templates, etc.) to highlight impact and importance of these gifts
- Analyze and evaluate reporting system and processes; identify and introduce opportunities to incorporate technology and donor centric approaches that are sustainable, impactful and scalable
- Provide guidance and education to Faculty Advancement Officers on the financial data provided to aid in their understanding for donor meetings

Oversight of Stewardship of Donor Funded Gift Agreements

- Provide overall fund stewardship management for donor-established endowment and non-endowed (trust) funds, monitor spending balances and ensure spending is consistent with donor agreements. Work with all endowment account holders to ensure that they understand their roles and responsibilities as stewards of donor funds, and prompt or confirm their role as unique obligations are discussed through agreement writing process
- Liaise with on-campus partners to identify priority projects and develop a work plan for improvements to endowment management procedures
- Collaborate with team members on coordination of processes and opportunities to ensure donors are thanked by beneficiaries

Manage a University of Waterloo Inventory of Named Spaces and Campus Potential Naming Opportunities

- Direct staff through naming opportunity approval process
- Advise fundraisers on potential funding levels for individual spaces based on a combination of set formulas, similar precedents, and particular space location and traffic circumstances
- Manage the inclusion of approved naming opportunities and newly named spaces in the inventory
- Act as a campus resource and provide guidance to staff on design and implementation of physical recognition, including appropriate signage and/or plaque specifications and language when spaces are named

Support Donor Relations and Stewardship Efforts

- Provide input and expertise to discussions pertaining to donor relations and stewardship programs and events
- Develop and deliver training sessions to internal stakeholders involved in the preparation of agreements and other accountability commitments
- Provide input to team members in the preparation of custom impact reports and stewardship plans for donors
- Regularly assess processes and procedures and identify ways to optimize resources, improve processes, reports, controls etc.
- Other duties as assigned

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

Education

- Completion of a post-secondary degree preferably in Business Administration, Management, or Legal Studies and/or equivalent combination of education and experience in a fundraising and stewardship environment

Experience

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- 3-5 years of progressive experience with a proven track record of achievement and success within a donor relations and/or stewardship environment
- Experience with agreements and gift compliance an asset
- Experience with program analysis and management of technology based reporting systems an asset
- Experience with fund reporting and/or reconciliation is an asset

Knowledge/Skills/Abilities

- Strong understanding of charitable, legal and regulatory environment
- Sound judgement and problem solving ability
- Demonstrated ability to exercise utmost professionalism, tact and diplomacy
- Ability to think strategically and ability to anticipate needs
- Strict attention to detail and accuracy ,
- Strong interpersonal skills and proven ability to develop and maintain effective working relationships
- Excellent communication, writing, and presentation skills
- Experience with project management and demonstrated ability to manage competing priorities
Advanced knowledge of Microsoft Office, including Excel and other tools for data management and statistical analysis
- Sound financial literacy
- Ability to work autonomously and as part of a team in a complex and changing environment
- Experience with Raiser's Edge and SharePoint an asset

Nature and Scope

- **Contacts:** Success in this role requires communication and co-operative working relationships with internal advancement staff, employees in UW's Finance department, GSPA, SAFA, the Secretariat, President's Office, as well as advancement fundraisers, finance officers and staff at all levels within faculty advancement offices. Externally, this position will deal with individual donors and high level donor contacts to respond to concerns, enquiries or to update our internal contact records. The type of information can be highly sensitive or private requiring consideration to privacy concerns, tact diplomacy and care.
- **Level of Responsibility:** This position is responsible for the overall process development, project management, risk management, and leadership of the gift agreement, donor naming opportunities, endowment and select non-endowed (trust) stewardship reporting programs.
- **Decision-Making Authority:** This position is responsible and accountable for establishing priorities within the realm of the above job responsibilities and related to feedback and discussion with partners in GSPA, SAFA, Finance and internal fundraising staff. When higher level input is required, decisions are referred to Associate Director, Stewardship and Donor Relations and/or AVP Advancement Services
- **Physical and Sensory Demands:** This position requires attention to detail and the ability to function in a semi open-concept environment.
- **Working Environment:** This position requires extensive periods of time reviewing documents, figures etc. in detail. Available to work flexible hours during peak reporting times. Otherwise exposure to disagreeable conditions is minimal and consistent with positions typical of this level with exposure to stress and pressure associated with work responsibilities and deadlines