Job Description

Job Title:	Donor Relations Officer
Department:	Office of Advancement
Reports To:	Associate Director, Stewardship
Jobs Reporting:	None
Salary Grade:	USG 10
Effective Date:	June 2024

Primary Purpose

This position fosters positive and long-term donor relationships that are critical to philanthropic support. As part of the Donor Relations and Stewardship team, they help to build a culture of gratitude, inspiration and accountability by stewarding donors and by providing strategies and plans, meaningful recognition programs, impactful reports/communications, and engaging donor experiences.

In collaboration with the Associate Director, the Donor Relations Officer is responsible for the strategy, design, implementation and co-ordination of a comprehensive donor relations and stewardship system. They develop and execute a range of integrated, consistent, and scalable programs and processes that appropriately contribute to best-in-class donor experiences. The Donor Relations Officer also works in close collaboration with donors' primary solicitors' campus wide and/or project leads and teams in Central Advancement.

Key Accountabilities

Donor Relations and Relationship Management

- Manage a system to prioritize, prepare and track stewardship reports, as well as any special stewardship requests.
- Lead collaborative development of custom stewardship and engagement plans for major giving and top tier donors by working with central colleagues and Faculties to provide direct value-added service.
- Responsible for the creation, accuracy, timeliness, and quality of a wide variety of donor relations and stewardship communications, including personal communications, as well as custom and targeted impact reports that convey to donors the impact of their giving.
- As appropriate and agreed upon, the Donor Relations Officer may be designated as Stewardship Relationship Manager for constituents identified in permanent stewardship, as well as lead regular stewardship efforts for specifically identified UW wide pooled funds and/or donor funded awards.
- Accountable for the information gathering associated with donor stewardship and impact reporting process.
- Create new and/or enhanced impact reporting tools and suite of standardized templates with accompanying process documentation to ensure quality, accuracy and uniformity of reporting by multiple users. Utilize digital stewardship solutions and technology as part of reporting toolbox options.
- Accountable for managing and overseeing the Central DRS team Student Award Beneficiary database and associated collection, review, and dissemination of student impact messages. Supervises others who perform any associated processes. Ensures all outputs are executed with accuracy, timeliness, and a high standard of care.
- As part of DRS team, responds to donor and student beneficiary inquiries providing exceptional service. May work directly with donors as part of relationship management.
- Liaises with Student Affairs and Financial Aid (SAFA) and Graduate Studies and Post-Doctoral (GSPA) to improve process for collection of student submissions for stewardship reporting purposes.

- Routinely monitor and assess processes to improve procedures, reports, tools, and controls in accordance with established guidelines.

Donor Recognition and Engagement

- Identify and develop inspiring engagement opportunities for donors to strengthen donor engagement and prospecting.
- Ensure gift recognition and stewardship policies and procedures are followed to provide consistency and integrity system wide.
- Oversee donor recognition programs that include support and guidance for any donor lists, donor recognition plaques/fixed signage, Advancement gift recognition matrix, donor preferences etc. Assists with the development of signage standards and best practices and works in collaboration with the Senior Stewardship and Agreements Officer (Naming Opportunities lead).
- Provide counsel and support to Faculties and other teams for donor recognition plans and options that are appropriate for the type/level of donor gifts, budget, timeline and specific donor history and preferences.
- May participate in planning meetings with donor's primary solicitors to determine appropriate individualized recognition and stewardship plan. This may include planning and executing donor visits, meetings with award recipients, campus visits, recognition gifts, reviewing announcements, award nominations, as well as other special recognition requests.
- Provides counsel and guidance to Faculties and other teams for gift announcements, ground breakings, donor visits, receptions, special performances, etc. as appropriate.
- In consultation with the Associate Director, provide planning and strategic direction for outcomes associated with all recognition, engagement, and event activity targeted to any associated DRS giving Societies (e.g. lifetime giving).
- Collaborate with other Advancement teams to ensure giving Societies/donor recognition program best practices align across other UWaterloo giving societies (i.e. Circle and Laurel) as well as coding coherence and name treatment (e.g. 'recognition' names)
- Lead review of lifetime giving Society (1957 Society) and oversee ongoing management and implementation of any related recommendations.
- Works closely with the Advancement Events team who lead on large scale and high-profile event execution and logistics.
- Work with other teams to leverage Advancement events, as appropriate, and proactively seek additional donor engagement opportunities.
- Participate in the emerging community of practice for virtual events.
- Budgets for, incurs, and reports on all stewardship related expenses

Project Management and Other

- Oversee, co-ordinate, and where appropriate execute special projects and initiatives that may be assigned by Associate Director. Provide project status reports on ongoing basis.
- Ensure DRS procedure manuals and process documents are current, accurate, and maintained
- Evaluate impact reports, events, projects, email and digital communications, and other key outputs via benchmarks and metrics. Ensure key standards are met. Provide recommendations as needed.
- Support the timely resolution of donor relations and stewardship-based inquiries through research, problem solving, and communication with relevant staff members and on campus partners.
- Maintain accurate, up-to-date Raiser's Edge records of donor stewardship activity
- Work collaboratively as part of DRS team to strategically support Advancement and University goals.
- In collaboration with the Associate Director, facilitate recruiting, training and supervision of co-op student(s) and/or contract and casual workers.
- Stay abreast of industry trends in stewardship and donor relations and seek to identify new methods which can be implemented Assists in researching and benchmarking with other institutions to identify best practices in stewardship programs. Provides assistance in the implementation and institutionalization of best practices. Comply with fundraising policies, goals, and procedures.
- Other duties as assigned,

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**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

- Bachelor's degree, preferably in Marketing, Business or Communications, or equivalent combination of education and experience. CFRE or fundraising certificate preferable.

Experience

- 5+ years of experience working in a fundraising environment with demonstrated emphasis on stewardship and donor relations responsibilities.
- Demonstrated experience in conceptualizing and executing donor cultivation and stewardship plans with the highest degree of care.
- Proven experience and track record in project management and execution, impact communications, event conceptualizing, and engagement strategies.
- Excellent written and verbal communication skills with prior experience writing and creating a variety of donor correspondence, impact reports and other stewardship collateral.
- Expertise with learning new online software platforms and packages with the ability to maximize functionality and manage/optimize workflows. High comfort level and experience with the utilization of technology and digital based solutions.

Knowledge/Skills/Abilities

- Demonstrated analytical, strategic-thinking, adaptability and relationship building skills are essential.
- Ability to work independently, take initiative, and prioritize multiple demands in a complex environment.
- Exceptional organizational skills with demonstrated ability for meticulous accuracy.
- Excellent written and oral communication skills and experience writing and producing donor communications. Demonstrated ability to create, plan and execute creative content that successfully conveys impact and inspires action.
- High comfort level with data management, including list-management and sophisticated relational databases (e.g., Raisers Edge) and preferably other emerging donor-communications platforms (e.g., Mailchimp, ThankView) High proficiency in all Microsoft Office products, particularly Excel. '
- Excellent interpersonal skills with a strong sense of diplomacy and professional integrity.
- Demonstrated ability to build strong, collaborative relationships within and across teams in a large, dynamic and complex environment.
- Creative, positive, team-building approach with a strong donor and client-service mindset
- Previous work in an academic environment is an asset.
- Familiarity and understanding of financial reporting procedures.
- Knowledge of federal and provincial legislation affecting charities, as well as donor relations best practices.

Nature and Scope

- **Contacts:** Internally, works closely with colleagues across Advancement and campus (e.g. Student Awards and Financial Aid Office, Graduate Studies, Plant Operations, etc.), including interactions with senior leadership. Participates as member of Donor Relations and Stewardship team and reports to the Associate Director. Externally, they will also regularly interact and have direct contact with students, major individual and corporate donors, leaders of the business community, alumni, and other friends of the university. On occasion, works closely with external service providers (e.g. graphic designers, photographers, business vendors etc.).
- **Level of Responsibility:** This position may have contract or other staff oversight and to achieve expected results they must effectively manage inter-colleague relationships and project-manage activities. Responsible for direct contact donor stewardship and relations with donors, as well as

creating impact reports, planning and delivering stewardship and donor relations programs and events on time and on budget. Must be able to manage deadlines, budgets, and prioritize while ensuring final products are at the highest standards. Must be able to take initiative where minimal direction is provided and manage challenging, complex and/or sensitive donor issues. Operates with minimal supervision.

- **Decision-Making Authority:** This position is responsible and accountable for establishing priorities within the realm of the above job responsibilities. He/she demonstrates competency in problem solving within a complex work environment. Must determine the optimum course of action to solve problems and discretion must be used around issues to be escalated. Must be proactive in contributing ideas and solutions to Associate Director, senior leadership, and development officers.
- **Physical and Sensory Demands**: Some moderate physical demands (walking, lifting, carrying, event set up). Deadline pressures with concurrent demand for thoroughness and accuracy. Exposure to stress and pressure associated with events and extended computer use.
- **Working Environment:** Office based position. Exposure to the stress and pressure associated with being accountable and responsible for impact reports, recognition, and related points of contact with our most significant donors. This position requires occasional travel and the ability to works some evenings and weekends to attend donor events, both on and off campus, as needed.