

Job Description

Job Title:	Donor Relations Officer
Department:	Office of Advancement
Reports To:	Associate Director, Stewardship
Jobs Reporting:	None
Salary Grade:	USG 9
Effective Date:	December 2020

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 meaningful recognition programs, impactful reports/communications, and engaging donor experiences and events. The Donor Relations Officer develops and executes a range of integrated, consistent, and sustainable 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 and/or project leads and teams in Central Advancement

Key Accountabilities

Donor Relations and Relationship Management

- Responsible for the creation, accuracy, timeliness and quality of a wide variety of donor relations and stewardship communications, including personal communications, event collateral, as well as custom and targeted impact reports that convey to donors the impact of their giving
- 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
- 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. Explores digital stewardship solutions in collaboration with other teams.
- Coordinate and oversee processes, systems, and opportunities to ensure donors are thanked by beneficiaries
- 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

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- Lead review of lifetime giving Society (1957 Society) and oversee ongoing management and implementation of any related recommendations.
- Play a lead role in donor recognition and engagement for 1957 members to ensure this cohort of donors receives timely and personal thanks and appreciation, appropriate impact reporting, as well as opportunities to engage with University events and leadership
- Collaborate with other Advancement teams to ensure 1957 Society and donor recognition program best practices align across other UWaterloo giving societies (i.e. Circle and Laurel)
- Ensure donors are accurately recognized and coded for lifetime giving Society membership and properly recognized in any published list

Donor Events

- Plan and execute flawless donor relations events, in consultation with Advancement teams, including volunteer recruitment and management, project management and post event evaluation. This may include organizing special visits, meetings with student award recipients, and other activities designed to deepen donor engagement.
- Provides counsel and guidance to Faculties and other teams for gift announcements, ground breakings, donor visits, receptions, special performances, etc. as appropriate
- Work with other teams to leverage Advancement events, as appropriate, for additional donor engagement opportunities
- Work alongside DRS team members and other teams (e.g. Advancement Communications, Alumni Relations,) to develop strategies for virtual donor focused events, as well as digital engagement opportunities. Participate in emerging community of practice for virtual events

Project Management and Other

- Provide coordinated project management for special donor relations initiatives and projects
- 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 in order to strategically support Advancement and University goals
- In collaboration with the Associate Director, facilitate recruiting, training and supervision of co-op student(s)
- Stay abreast of industry trends in stewardship and seek to identify new methods which can be implemented
- Comply with fundraising policies, goals, and procedures
- 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

- 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
- Proven experience and track record in project management and execution, impact communications and event management
- Excellent written and verbal communication skills with prior experience writing variety of donor correspondence, impact reports and other stewardship collateral
- Demonstrated experience in conceptualizing and executing donor cultivation and stewardship events

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
- 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, including interactions with senior leadership. Participates as member of Donor Relations and Stewardship team and reports to the Associate Director. 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, etc.).
- **Level of Responsibility:** The position has no direct supervision of others and performs specialized work with minimal supervision. While they will not have direct staff management, 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 programs and events on time and on budget. Must be able to take initiative and manage deadlines and priorities while ensuring final products are at the highest standards. May manage coop students...
- **Decision-Making Authority:** This position is responsible and accountable for establishing priorities within the realm of the above job responsibilities. He/she determines the optimum course of action to solve problems and discretion must be used around issues to be escalated.

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- **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. This position requires occasional travel and the ability to work some evenings and weekends to attend donor events as needed.