

Job Description

Job Title:	Senior Stewardship Officer
Department:	Office of Advancement
Reports To:	Director, Major and Principal Giving
Jobs Reporting:	None
Salary Grade:	USG 10
Effective Date:	February 2019

Primary Purpose

Develops and executes a range of stewardship strategies and activities to further develop the relationship between the university's most significant donors and their areas of philanthropic interest. The Senior Stewardship Officer on the Advancement Strategy team works in close collaboration with donors' primary solicitors and/or project leads in Central Advancement or in faculty-based fundraising teams. When appropriate, and agreed upon with the primary solicitors and/or project leads, the Senior Stewardship Officer will engage directly with the donor for the purpose of implementing a stewardship strategy.

The Senior Stewardship Officer will work closely with the Central Advancement Stewardship and Donor Relations team to seek assistance in implementing stewardship strategies, to ensure duplication of efforts are avoided, and to ensure policies, guidelines, and standard protocols are observed.

Key Accountabilities

Create customized stewardship plans for the university's most important donors

- Manage a portfolio of top donors in collaboration with the Advancement Strategy leadership team; the incumbent will be the designated Stewardship Manager on any \$1m+ files assigned to the: Vice-President Advancement, Associate Vice-President Advancement Strategy, and the Director, Advancement Strategy
- As appropriate and as agreed upon by the donor's primary solicitors and/or project leads, the Senior Stewardship Officer will be designated as Stewardship Manager for faculty-specific donors at the \$1million+ level
- Work in close collaboration with the primary solicitors and/or project leads to ensure a high level of synchronicity is achieved for the benefit of the donor's entire experience with Advancement, faculty-based priorities and the university
- Develop a written plan for each donor in the portfolio; plans will be developed and carried out on an iterative basis and shared with the Director, Major and Principal Giving and the donor's relationship manager
- Maintain stewardship plans, adjusting as needed over the course of the donor's relationship with the university and in collaboration with the rest of the Advancement Strategy team and the donor's primary relationship manager

Implements stewardship activities and strategies

- Working in concert with the Advancement Strategy leadership team and the donor's primary relationship manager, the Senior Stewardship Officer will take initiative to implement donor stewardship plans
- Advise, create, and ensure implementation of stewardship strategies to be carried out by the President and Vice-Chancellor and/or the Vice-President of Advancement

Job Description



<ul style="list-style-type: none">• Develop activities for individualized stewardship opportunities and coordinate resources from the Advancement Strategy team, Central Advancement, faculty-based Advancement units or the university at-large to implement plans, e.g. individual stewardship donor campus visits, digital communications, personalized recognition gifts• Play a key role in the development and implementation of donor recognition events in assigned donor pool or as requested by faculty units or primary solicitor e.g. gift events, luncheons/dinners, student meet-and-greets, and other events to honor, thank and inspire current donors• Develop and implement at least 4 stewardship events per year for donors in Senior Stewardship Officer's donor pool• The Senior Stewardship Officer will conduct 24 in-person stewardship donor meetings per year (average of 2 per month) to implement stewardship plans (not including group events or activities); these meetings can be joint-calls with the primary solicitors or individual calls when appropriate and when agreed upon with the primary solicitor• Be available to guide or give advice to central or faculty-based colleagues on 'best practice' stewardship concepts, as appropriate
<p>Inter-unit and pan-campus coordination</p> <ul style="list-style-type: none">• Seek to build robust advancement and pan-campus relationships to provide exceptional donor stewardship opportunities• Take initiative to learn about each assigned donor's interests and how those interests can be translated into a meaningful donor stewardship experience• Maintain transparent and responsive communications with campus colleagues, recognizing the role of Advancement Strategy as an Advancement-wide partner
<p>Stewardship Reports</p> <ul style="list-style-type: none">• Project manage the development of high-level and high-impact comprehensive stewardship reports for two of the university's top donors per year• Project manage the development of niche stewardship reports, report updates, or official reporting requested by a donor• Ensure that the Senior Stewardship Officer's portfolio of donors receive annual reporting on their gift as appropriate per the type of gift; ensure this is done at the direction or in collaboration with the primary solicitor• Utilize the resources of Central Advancement to complete all of these reports, delegating tasks to colleagues as needed to ensure efficient and effective product delivery whilst maintaining other key activities of the role as described above
<p>Ensuring deliverables on donor-funded initiatives are met and that the university is accountable to its most significant donors</p> <ul style="list-style-type: none">• In collaboration with the primary relationship manager, stay current on donor project deliverables• Triage, and where appropriate, resolve any issues related to the University and donor compliance as per donor agreements
<p>Other</p> <ul style="list-style-type: none">• The Senior Stewardship Officer will stay abreast of industry trends in stewardship and seek to identify new methods which can be implemented at the university• When appropriate and in collaboration with the Director, Advancement Strategy, develop and test new ideas for robust donor stewardship for assigned donors.• 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*

Job Description



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 <ul style="list-style-type: none">• Bachelor's degree or equivalent combination of education and experience
Experience <ul style="list-style-type: none">• 5+ years of experience working in a fundraising environment with emphasis on stewardship and donor relations responsibilities• Proven experience and track record in donor stewardship project management and execution, impact communications and event management for a discerning audience• CFRE designation an asset
Knowledge/Skills/Abilities <ul style="list-style-type: none">• 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• 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• Previous work in an academic environment is an asset• Exceptional expertise in use of Microsoft Office tools and sophisticated relational databases, such as Raisers Edge• Familiarity with 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. Always keeps colleague relationships and collaboration in the highest regard, recognizing the degree to which the success of the Senior Stewardship Officer is directly tied to the quality of campus relationships. The incumbent may also interact with major individual and corporate donors, leaders of the business community, alumni, and other friends of the university.
- **Level of Responsibility:** The position has no direct supervision of others and performs specialized work with minimal supervision. The donors in their portfolio represent some of the most important university Advancement relationships and thus they must maintain a high level of professionalism in the development and execution of stewardship activities. While they will not have direct management of staff, to achieve the results expected of them they must effectively manage inter-colleague relationships and project-manage complex activities. It is expected they will coach colleagues in an effort to delegate responsibilities as needed and ensure the final products are at the highest standards. Must be able to take initiative and manage deadlines and priorities. Will track budgets related to individual stewardship activities or events.

Job Description



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- **Decision-Making Authority:** This position is responsible and accountable for establishing priorities within the realm of the above job responsibilities. They determine the optimum course of action to solve problems and discretion must be used around issues to be escalated.
 - **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 with occasional travel to meet with donors. This position requires occasional evening and weekend work to attend donor events as needed.