

## Job Description

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<b>Job Title:</b>	Donor Relations Officer
<b>Department:</b>	Dean of Engineering Office, Advancement Unit
<b>Reports To:</b>	Associate Director, Development & Alumni Affairs
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 10
<b>Effective Date:</b>	April 3, 2018

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### **Primary Purpose**

Develops and executes a range of stewardship, donor relations and donor communications activities to engage and acknowledge the Faculty of Engineering's donors in order to foster the positive donor relationships that are critical to philanthropic support of the faculty. Manages corporate sponsor accounts and programs for the Faculty. This position will work with Engineering's development staff to oversee gift and sponsorship acceptance and acknowledgement, donor recognition, communications and stewardship and to initiate, implement and evaluate donor and sponsor relations programs for the faculty. Responsible for the design, implementation and coordination of a comprehensive donor relations and stewardship system that appropriately and consistently promotes interaction and recognition of donors and sponsors at all levels.

### **Key Accountabilities**

#### **Program Management**

- Oversees the development, management, and implementation of a revitalized, innovative, and first class donor relations program to complement the objectives of the overall fundraising goals of the Faculty of Engineering including first-time donors, annual, principal, major and leadership giving donors, students and alumni
- Suggests creative donor recognition options (e.g., events, naming opportunities, award nominations, gifts) that are appropriate for the type/level of the donor gift, budget, timeline, and specific donor history and preferences
- Maintains accurate, up-to-date Raiser's Edge records of donors' stewardship activity
- Manages a system to prepare, send and track acknowledgements from the Dean, Director, Chairs, Associate Director and development staff for selected gifts
- Manages a system to prioritize, prepare, send and track stewardship reports for gifts as well as any special stewardship requests, including researching and producing all content for the reports
- Manages a system to prioritize, prepare and track any major gift proposals as well as any special proposal requests
- Responsible for the development and implementation of donor recognition plans, which may include special acknowledgements, press releases, plaques, recognition gifts, event announcements, and/or signage, as well as any special donor recognition requests
- Budgets for, incurs, and reports on all stewardship-related expenses
- Proactively seeks donor engagement opportunities

#### **Collaboration**

- Participates in planning meetings with the donor's primary solicitors to determine the appropriate activity types and timing for each donor
- Meets regularly with the Director of Advancement, Associate Director of Development & Alumni Affairs, development staff, the Student Awards and Financial Aid Office representatives, and

Graduate Studies Office representatives to enhance current stewardship programs and design new programs intended to accomplish a collaborative approach that invites input and participation, a commitment to stewardship planning which incorporates meaningful donor engagement and integrated stewardship planning and programming with the central advancement donor relations and stewardship team

- Develops and sustains excellent working relationships at all levels of the faculty and university to generate interest and participation in stewardship initiatives
- Works collaboratively with senior writing staff to prepare and provide clear, concise and complete verbal and written information for stewardship communications tools at a level appropriate to the audience (e.g. students, donor, external awards review committee, etc.)
- Works collaboratively with development, alumni and student relations staff to develop, implement and track a strategic affinity plan that engenders a culture of philanthropy across the Faculty of Engineering through engaging student, alumni and donor group events, aligned with marquee milestones each year (Summer Semester, Thanksgiving, Commencement)
- Works collaboratively with development staff to develop and implement strategies to attract additional contributions from existing donors
- Acts as a contact for development officers and donors to address questions about donor funds

### **Communications/Events**

- Ensures that all gifts and pledges are acknowledged appropriately and effectively and in a timely manner
- Writes custom acknowledgement letters and other responses to direct mail and individual gifts
- Composes donor and prospective donor correspondence for the Dean and development staff
- Creates and arranges delivery of custom stewardship reports and other communications (e.g., endowment reports, thank you notes from scholarship recipients, relationship documents, chair reports, 1957 Society certificates) that demonstrate the impact of the donor's gifts
- Arranges the ordering and installation of various donor recognition items (e.g., plaques, donor walls, trees, gardens)
- Collaborates with appropriate development staff on the design and execution of selected stewardship events including in person stewardship reports and dedication ceremonies
- Makes guest recommendations for event invitation lists based on donors' interests and relationships
- Organizes large-scale, high-profile recognition events (e.g., gift announcements, ground breakings, grand openings, donor receptions, special performances) on campus, in the community, and occasionally abroad. This may involve, but is not limited to creation of the event agenda, engagement of speakers, booking of venue, contracting of audio-visual services, distribution of invitations, tracking of participants, purchase of gifts, arrangements of photography and publicity, budgeting and reconciliation, etc.
- Organizes special campus visits, tours, speaking engagements, luncheons with student award recipients, etc. for donors and prospective donors
- Arranges invitations to special events (e.g., institutional anniversary celebrations, retirement parties, president's ideas exchanges, distinguished lectures, etc.)
- Provides on-site oversight on event days to direct activities and problem solve as needed
- Coordinates scholarship recipient communications with scholarship donors, including thank you letters to be written by students
- Working with the development staff, drafts gift agreements as needed, circulate through appropriate channels and track signatures
- Ensures gifts are being spent in a timely and appropriate manner (e.g., awards are disbursed, endowment funds are being utilized)

### **Sponsorship**

- Manage all faculty-wide sponsors and stakeholders of the Waterloo Engineering Capstone Design Program, including collaborating with development staff to solicit and develop new sponsorships for the program and map out corporate activations
- Develop and execute on both short and long term sponsorship strategic plans for the Capstone Design Program
- Greet and steward sponsors at Capstone Design Program Symposia and related activations
- Provide summary report to all faculty-wide sponsors of their return on investment
- Proactively develop and maintain trustworthy, productive, problem-solving working relationships with sponsor contacts, Faculty Capstone Coordinators and program staff, across each Engineering Department, maintaining and dispersing information to groups as required
- Responsible for the management of approved sponsorship activation budget(s) in accordance with the goals outlined for faculty-wide Capstone Design Program sponsor(s)

### **Required Qualifications**

#### **Education**

- Bachelor's degree or equivalent combination of education and experience

#### **Experience**

- 5+ years of experience working in a stewardship, donor relations or marketing role with a proven track record of planning and delivering high-quality personalized stewardship events and activities
- Previous work in an academic setting is an asset
- Experience with front-line fundraising an asset

#### **Knowledge/Skills/Abilities**

- Competencies will include: excellent problem-solving capabilities and analytical skills, process and detail oriented with ability to think creatively and strategically, good understanding of event planning and stewardship best practices, organizational skills, attention to detail and ability to handle multiple priorities and deadlines
- Exceptional interpersonal, verbal and written communication skills with proven ability to interact appropriately with various individuals, including senior university administrators, donors, sponsors, alumni, vendors, and volunteers
- Ability to work independently and collaboratively

### **Nature and Scope**

- **Contacts:** Internally, communicates and collaborates with the Director of Advancement, Dean of Engineering, Department Chairs, Associate Deans, Associate Director, Development & Alumni Affairs, Associate Director, Marketing and Communications; President's Office; Vice-President, Advancement; Associate Vice-President, Principal Gifts; Principal Gifts team; and central Stewardship and Donor Relations team to organize highly customized stewardship events, services, and activities. Works with various university units (e.g., Food Services, Parking Services, Audio-Visual Services, Records, Central Stores, Plant Operations, Graduate Studies Office, Student Awards and Financial Aid Office) to organize on-campus events and recognition items. Externally, communicates with vendors and volunteers, and interacts with donors, leaders of the business community, alumni, and other friends of the university as appropriate.
- **Level of Responsibility:** Responsible for the planning and execution of personalized stewardship events and services for the Faculty of Engineering's donors. Must meet multiple and/or tight deadlines. Must operate within budget and do stewardship-related financial reporting. Operates with minimal supervision.

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- **Decision-Making Authority:** Must be able to deliver stewardship events and activities that engage the faculty's donors. Must be able to take initiative where minimal direction is provided and manage priorities, deadlines, and budgets. Must be proactive in contributing ideas and solutions to the Director of Advancement, Dean of Engineering, Associate Director, Development and Alumni and Development and Alumni Officers.
  - **Physical and Sensory Demands:** This is a role primarily in an office setting, but it involves moderate physical demands (walking, and stair climbing, lifting and carrying up to 20 pounds) in various locations resulting in risk of fatigue, strain, and/or injury.
  - **Working Environment:** Minimal exposure to the disagreeable conditions typical of an administrative position. Exposure to the stress and pressure associated with being responsible for high-profile events for the university's most significant donors. There may be unusual hours or schedules, different event venues both on and off campus, and some domestic travel.