#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Manager, Philanthropic Stewardship

**Job Number:** X-299 | VIP: 1035

**Band:** EXEMPT-6

**Department:** External Relations & Development

**Supervisor Title:** Director, Portfolio Operations & Digital Philanthropic Strategies

**Last Reviewed:**  September 16, 2021

#### **Job Purpose:**

As a member of the Portfolio Operations leadership, the Manager, Philanthropic Stewardship is responsible for all stewardship objectives related to university philanthropic activity, including donor and volunteer relations. The Manager provides strategic direction and management of our stewardship plans to deliver meaningful and impactful experiences for the University’s donors and volunteers and delivers objectives which foster new and continued philanthropic participation in support of the University. This role also ensures our top donors have senior administration as their relationship managers and have the highest level of stewardship.

In addition, the Manager oversees the delivery and creation of new donor funds and donor gift agreements; including ongoing monitoring of fund spending to ensure that funds are being disbursed in a timely manner and that accurate tracking of beneficiaries are recorded for historical and donor relations purposes.

The Manger is also responsible for the delivery of donor philanthropic reporting projects, oversight of donor and volunteer events, and bringing forward continuous improvement initiatives to the Director, Portfolio Operations & Digital Philanthropic Strategies that will enhance donor and volunteer contact at all levels and maximize available resources.

#### Key Activities:

***Stewardship & Recognition:***

1. Brings forward continuous improvement ideas regarding the University’s stewardship and recognition programs. Develops and delivers recognition strategies and plans for major gifts donors, campaign or senior volunteers, and other donors (e.g., Digital Campaign). In addition, develops and coordinates appropriate policies and procedures for donor and volunteer relations.
2. Develops, updates, and manages the naming recognition opportunities and their valuation at the university.
3. Manages existing and new donor walls and/or other forms of recognition, coordinating activities with internal constituents and external suppliers as required for design, installation, and maintenance of signage and plaques for recognition areas.
4. Coordinates with the President’s Office, the Vice-President, External Relations & Development, the Associate Vice President, Philanthropy & Alumni Engagement, the Director, Portfolio Operations & Digital Philanthropic Strategies, and other relevant individuals regarding the scheduling of stewardship or recognition appointments, contacts, and public or private events; including National Philanthropy Day, National Volunteer Week, major gift announcements, and other philanthropic events.
5. Manages information tracking regarding acknowledgement, recognition, on-going communications, and continued cultivation of past, current, and future donors to enhance their relationship with the University and increase the likelihood of continued and new contributions.
6. Works closely with other Portfolio Operations leadership staff to ensure gift acknowledgement, and appreciation correspondence for various fund levels are personalized and effective.
7. Writes correspondence and coordinates special recognition activities as required.
8. Proactively supports development officers with proposals and stewardship plans for donors and top prospects.
9. Ensure appropriate record keeping of all stewardship and recognition activities with major gifts donors and campaign/senior volunteers, ensuring that all pertinent correspondence and documentation is appropriately filed, and key information is recorded in the database.

***Fund Management & Gift Agreements:***

1. In collaboration with the Development portfolio staff and representatives from various University departments, establishes and records gift agreement language (and/or sponsorships, as appropriate) for review by the Director, Portfolio Operations & Digital Philanthropic Strategies for approval by the Associate Vice President or Deans; includes, working closely with Graduate Studies, Financial Aid, Athletics, Academic departments, and the Trent International Program in developing terms of reference and calendar wording for newly established scholarships, bursaries, prizes and awards.
2. Provides leadership in assuring compliance with donor intent, including monitoring, tracking, and reporting status/progress internally and to the donor.
3. Manages the creation and appropriate coding of newly created donor funds as needed.

***Reporting, Monitoring, & Analytics:***

1. In collaboration with Portfolio Operations leadership, develops robust systems tracking and reporting of stewardship and recognition phases of the donor life cycle; in an effort to provide continuous clarity and automation of required actions and timing of stewardship activities.
2. Develops and manages annual stewardship reporting projects, including financial reporting on endowed funds and significant expendable gifts and other relevant annual publications. Develop personalized letters with results-based reports for top 100 donors. Trent University’s endowments will soon be valued at $100 million with over 1400 distinct funds which require reporting.
3. Brings forward continuous digital and procedural plans to the Director, Portfolio Operations & Digital Philanthropic Strategies designed to improve process and enhance outreach at all activity levels.
4. Manage the budgets for the recognition and stewardship programs and operate within provided budget restraints, closely monitoring expenses pertaining to recognition and stewardship programs.
5. Regularly review and update endowed (and major expendable) gift agreements; work with departments and university leaders to ensure gifts are being utilized appropriately and fully; orient new departmental staff as appropriate on the philanthropic funds under their care.

***Other Assignments:***

1. Represents Portfolio Operations on Admissions, Enrolment and Student Awards committees.
2. Provide stewardship direction to the financial allocations process.
3. Provide support on special projects as determined by the Director, Portfolio Operations & Digital Philanthropic Strategies.

#### Education Required:

* Honours University Degree (4 year).

#### Experience/Qualifications Required:

* Minimum five years’ experience in development, donor and volunteer relations, advancement services, special events and/or related fields.
* Minimum 1 year of experience developing donor fund agreements or similar complex agreements.
* Demonstrated experience with Financial Donor Fund activity monitoring.
* Demonstrated knowledge and ability to develop, execute and/or support a complex donor and volunteer relations program, including recognition and stewardship activities.
* Demonstrated ability to interact comfortably, tactfully, and effectively with donors and volunteers, varied internal and external constituencies, and a wide range of stakeholders.
* Adept at problem solving and excellent judgement in situations requiring initiative and tact.
* Proven skills and ability to manage multi-phase projects from inception to completion.
* Excellent organizational, interpersonal, verbal and written communication skills.
* Experienced in handling sensitive and confidential situations and issues.
* Demonstrated ability to work independently and as part of a team.
* Detail-oriented, well-organized, focused and goal-oriented, with both initiative and energy.
* Proficiency with MS Office (Word, Excel), Raiser’s Edge or equivalent fundraising database, internet research.
* Flexibility to work occasional evenings and weekends.

**Job Evaluation Factors:**

**Responsibility for the Work of Others**

Direct Responsibility for the Work of Others:

* X-389 Stewardship Officer, Donor & Volunteer Relations.
* Student employees.

Indirect Responsibility for the Work of Others:

* Students, volunteers, staff of internal academic departments. Coordination of their responsibility in events directed by the Stewardship Manager.

**Analytical Reasoning**

* Analytical reasoning is applied to the continuous development and tracking of the philanthropic stewardship management, including report development, systems coding and tracking procedures. In addition, analytical reasoning is applied to planning and budget management, allocations and fund reconciliation, and special project management (e.g., annual endowment and donor reports).
* Judgment and experience in negotiating and working with donors on the designation of their donations including the development of gift agreement language.
* Sound judgement decisions regarding key stakeholders and types of donors and volunteers suitable to attend stewardship and recognition functions.
* Judgment in bringing forward stewardship issues to the Director, Portfolio Operations & Digital Philanthropic Strategies.

**Decision Making**

* Sound decision making is applied daily in all the areas identified under analytical reasoning.
* Negotiation and decision-making with volunteers, donors, stakeholders, and suppliers.
* Experience, discretion, tact, and judgment are required.
* Proactive interaction with faculty and other departments including senior level administration regarding campaign, stewardship and recognition matters.

**Impact**

* Activities impact upon further donations in support of the university.
* Handling of upset donors or volunteers or failing to monitor appropriate use of funds can have significant negative reputational impact.
* Successfully run events provide a positive response and enhanced reputation in the eyes of attendees; this leads to additional and larger contributions.

**Communication**

Internal:

* President’s Office – events, donor relations and appointments.
* Senior Administration – Vice President, AVP, Philanthropy & Alumni Engagement, Deans.
* Community Relations – event coordination.
* Financial Aid – regular meetings about bursaries and scholarship recipients.
* Graduate Studies – regular meetings about bursaries and scholarship recipients.
* Academic departments & Chairs – student awards, and endowed funds.

External:

* Top donors and volunteers – (tracking complex information) - development of endowed fund agreements, terms of reference for awards, events.
* Presidents of companies – as above.
* Peterborough Community members of community, agencies – events.
* Alumni – events.
* Students & families – contact about bursaries, scholarships.

\*\* High level of confidentiality required for top donors, especially those who remain anonymous.

**Motor/ Sensory Skills**

* Keyboarding & mouse manipulation - Computer usage impacts upon key responsibilities.
* Driving - To attend internal and external meetings.
* Dexterity/Coordination - Interaction at special events.
* Hearing, speech and visual - complex remote and face to face communication, negotiation and presentations.

**Effort**

Mental:

Sustained concentration & focus:

* Program and project planning.
* Budget and HR management.
* Verification of reports and lists and donor preferences.
* Fund reconciliation and administration.
* Event planning, logistics and evaluation.
* Producing endowed fund agreements, correspondence, reports.
* Interacting and negotiating with donors, volunteers, etc.
* Tracking contact reports.

Physical:

* Stairs – Office on second floor of Mackenzie House. Up and down stairs regularly to file room, meetings, and photocopier.
* Lifting - Moving equipment such as sandwich boards, zap banners, boxes, easels from the basement of Mackenzie House, into a vehicle and then into the venue for the event. Then back to Mackenzie House following the event.
* Standing for long periods – at events.
* Significant periods of time spent keyboarding, and also in meetings.

**Working Conditions**

Physical:

* Climbing stairs to office on second floor of Mackenzie House.
* Long periods of time spent keyboarding, in meetings.
* Frequent driving and travel requiring more than one hour.
* Prolonged standing at special events.

Psychological:

* Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks.
* Flexibility to work occasional evenings and weekends.
* Frequently deal with donor and volunteer sensitivities and stakeholder complaints.