POSITION SUMMARY

The Manager, Donor Relations contributes to the creation, design and implementation of comprehensive programs to foster and nurture lasting relationships between Simon Fraser University and its donors. The Manager implements plans that will: efficiently and effectively acknowledge, recognize and report on the impact made by donors at all levels of giving from annual to major gift donors; create and identify opportunities for donors to actively engage with the university; and communicate SFU’s appreciation for the value of philanthropic support.

DUTIES AND RESPONSIBILITIES

1. Manages a portfolio of client fundraisers to implement donor relations plans, including gift acceptance, reporting, recognition and engagement opportunities by:
   - coordinating the planning, development and implementation of regularly scheduled and special events to support the overall donor recognition program by identifying donor groups to be recognized, deciding on size and scope of event, planning event programming (including donor and student ambassadors and speakers), and liaising with advancement and other university staff to arrange venue, catering, and dates, and invite attendees.
   - contributing to the development and implementation of stewardship plans for corporate and individual major gift donors that includes creating and identifying opportunities for reporting, recognition and engagement; determining frequency and type of contact; involving other personnel as needed; and monitoring activities related to those plans.
   - strengthening SFU’s relationships with supporters in the community by providing exceptional service to donors and by liaising with corporate directors of finance and human resources, foundation trustees, community group chairs, influential supporters, and individuals.
   - managing a portfolio of donors in long-term stewardship that includes developing stewardship plans, maintaining the relationship with donors, and acting as the main point of contact for the university.
   - keeping abreast of best practices to implement donor recognition standards and plans.
   - collaborating with other University Advancement staff to develop and implement strategies to move donors through the giving cycle and generate additional philanthropic support.
   - liaising with advancement colleagues and university partner units to communicate donor stewardship guidelines and practices.
   - writing, producing and tracking gift documentation, including Deeds of Gift, Sponsorship Agreements, Terms of Reference and document revisions for all student awards and other university programming to ensure donations are used in accordance with donor wishes.
   - drafting donor correspondence for signature by Vice President Advancement and Alumni Engagement (VPAAE), President and other senior administration, including letters of celebration, congratulations and condolence.
   - writing and coordinating the production of various donor acknowledgements.
   - writing briefing notes for donor meetings and events.
   - developing written and financial content for general stewardship and impact reports, including the endowment stewardship report and annual donor report.
   - writing and developing fund and donor specific impact reports for annual gifts, endowments (including fund specific financial reporting), awards and special projects; maintains regular reporting schedule for major gifts.
   - managing the award fund reporting schedule, drafts reports and correspondence, and collects and distributes student thank you messages.
   - answering questions and provides ad-hoc reports regarding fund balances and spending activity for donors and internal units.

2. Carries out associated administrative responsibilities by:
   - managing a calendar of events at all three campuses and integrates university events into general donor recognition and engagement plans as well as tailored donor recognition plans for major gifts donors.
   - coordinating approvals for and creation of physical recognition and space naming and tracks activity in Blackbaud eCRM.
participating in the development and maintenance of a detailed and interactive donor relations website, including endowment portals, student thank you portals, and other features.

- collaborating with the records team to direct the production of recipient lists for correspondence, reports, celebrations and other external communications.
- coordinating the pledge reminder system to ensure pledges are collected in a timely and tactful manner.
- tracking stewardship activities in the Blackbaud eCRM database, including letters, endowment reports, upgrade requests, annual installment requests, meetings, phone calls, and status of terms of reference.
- coordinating facility tours, donor/student award meetings, other events and special projects as required.

**IMPACT OF DECISION MAKING**

The Manager, Donor Relations is responsible for:

- designing donor recognition programs including consideration of the best method of communication with specific donors; the time elapsed since the last contact with the donor or since the last gift; opportunities for personal visits with donors or student and donor meetings; donor features at SFU events and in media; and other recognition opportunities
- identifying donors to be stewarded; and the level of donor recognition benefits to be accorded at each of several donation levels
- designing and developing events featuring donors
- determining content and design of ad hoc reports sent to donors
- developing and recommending revisions to Terms of Reference, in consultation with donors, Chairs and Directors of Departments and the offices of the Registrar and Dean of Graduate Studies

**RELATIONSHIPS**

Establishes and maintains relationships and alliances. Maintains effective communication. Shares information and readily determines to whom to go for relevant information. Seeks assistance and feedback in the problem solving process. Partners with others to achieve expectations.

**QUALIFICATIONS**

Bachelor’s degree in Arts or Business Administration and four years of related experience in a fundraising environment, or an equivalent combination of education, training, and experience.

Excellent knowledge of, and respect for, the values culture of a university environment.

Excellent analytical reasoning, problem-solving and organizational skills.

Excellent interpersonal, communication (oral and written) and relationship management skills.

Ability to creatively develop programs to uniquely recognize donors to the university.

Ability to exercise mature judgment, initiative and independence in setting and accomplishing goals, and managing priorities and resources.

Ability to maintain confidentiality.

Ability to develop relationships and partnerships and to work collaboratively at all levels and areas within the organization.

Proficient in use of standard office applications, enterprise level information systems and constituent relationship management (e.g., MS Office, Blackbaud).

Ability to arrange suitable transportation to various work locations.

Initial Effective Date: October 24, 2017
Latest Revision Date: