

**University of Rochester
Stewardship Office
University Advancement
Title: Assistant Director**

Position Summary

This position is responsible for management of several high-visibility customized donor stewardship programs. The position requires personal interaction with donors designed to enhance stewardship and cultivation efforts. Other responsibilities include content management for more than 1,000 customized annual stewardship reports and for annual donor honor roll, and creation of agreements for new gifts. All facets of the position require an understanding of donor sensitivity and the ability to interact well with all Stewardship constituencies.

30% Customized Stewardship Reporting/Donor Interaction

- Manage content for more than 1,000 customized annual donor stewardship reports, collecting, organizing, editing and confirming overall accuracy of data to be used on external stewardship reports. Requires interactions with all University schools/units, over 100 specific departments, and numerous faculty and staff across the University to collect budgets, expenditures, recipient names, and fund impact data.
- Educate faculty and department representatives on the appropriate use of stewarded funds.
- Create and deliver scholarship recipient biographical surveys and manage responses.
- Customize individual stewardship reports to reflect donor interests specific to each fund.
- Meet or otherwise communicate with donors to address questions after annual reports are mailed. Personally deliver reports when appropriate.
- Ensure accurate reporting by managing quality of OASIS data, updating as needed.

25% Management and Oversight: Targeted Personal Stewardship

- Develop and manage innovative, targeted stewardship products, specifically:
 - Define targeted donor groups to receive individually tailored communications designed to encourage additional giving to the University
 - Work with internal and external communications staff and printers to design and produce special donor communications.
 - Meet or otherwise communicate with donors to provide further information on University programs and giving opportunities.
- Identify opportunities for personal stewardship of donors who do not receive annual reports. Personally visit or otherwise communicate with these donors, with the goal of cultivating heightened interest in the University.
- In response to donor inquiries regarding gifts or funds, conduct research, resolve issues, and meet with donors or facilitate communication between other staff and donors.

20% Management and Oversight: Programs

- Manage giving content for the annual campaign honor roll project, ensuring accuracy and working with gift officers to ensure donor's wishes are honored.
- Respond to donor requests and questions about honor roll content.
- Ensure accuracy of OASIS honor roll records.

20% Gift Agreements

- Advise gift officers and Advancement leadership on the creation of new gift agreements and customized templates for extraordinary gift scenarios and fundraising projects.
- Create original agreement language for a variety of specific gift situations and fundraising opportunities, including scholarship challenge programs, new facilities, professorships, and many other types of funds.
- Evaluate gift structures and strategies and advise on University policies, procedures, and legal issues.
- Present gift agreement template training and clinics and provide one-on-one consulting to Advancement staff and gift officers regarding gift agreements, University policies and procedures, and case-by-case gift agreement questions.
- Participate in meetings with Advancement, Financial Aid, Budget, and department staffs to improve understanding of processes across the University and to gather information and collaborate on new initiatives and donor strategies.

5% Other Responsibilities

- Support campaign or organizational needs and operations by participating in strategic planning and goal setting with Stewardship leadership.
- Staff Stewardship or Advancement events, such as the annual scholarship reception and Meliora Weekend.
- Participate in professional development activities such as conferences and webinars.
- Manage and direct other duties and special projects as requested by the Executive Director of Donor Relations and Stewardship and the Senior Director of Stewardship.

Qualifications

Bachelor's degree and 3 or more years of development experience, preferably in higher education, or equivalent combination of education and experience. Must be customer service-focused team player with solid skills in Access, Excel, Word, and other Microsoft Office products.