#### Trent University LogoEXEMPT JOB DESCRIPTION

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

**Job Number:** X-295 | VIP: 1072

**Band:** EXEMPT- 8

**NOC:** 0213

**Department:** External Relations & Development

**Supervisor Title:** Associate Vice-President, Philanthropy & Alumni Engagement

**Last Reviewed:**  December 3, 2021

#### **Job Purpose:**

The Director, Portfolio Operations & Digital Philanthropic Strategies is responsible for the leadership and strategy for setting External Relations & Development portfolio’s technological, information, and digital fundraising strategies that support University-wide fundraising, alumni engagement, and community relations. The Director oversees the activities of Advancement Services and Stewardship Management; systems, technology, online development, the donations office and charitable compliance, prospect research, portfolio analysis, donor agreements, and donor/volunteer stewardship. In addition, the Director is responsible for the portfolio’s digital fundraising strategy, including direct mail and e-solicitations.

The position is a member of ER&D’s senior team. The Director liaises and collaborates with numerous departments across the University to develop and ensure a sophisticated and well-organized centralized database, accurate record keeping, robust information management systems, regular reporting and analytics, sound data security, charitable regulatory compliance, financial allocations and reporting, effective prospect research, fundraising support, and charitable receipting. The Director also supports the University’s relationship management and communication/engagement with multiple internal and external stakeholders through the development of effective online platforms, and digital and communication development strategies.

Reporting to the AVP, Philanthropy and Alumni Engagement and as a member of the ER&D senior management team, this individual is a technical and subject matter expert who leads specialised guidance to the portfolio and University and remains current in the area of post-secondary advancement including charitable legislation compliance.

#### Key Activities:

##### Leadership & Strategic Planning / Information Management & Data-Driven Digital Strategies:

* Responsible for ensuring a high quality, robust and effective information management, action tracking, record keeping and reporting system in the Raisers Edge and/or other databases to strategically support the portfolio goals and other relevant University initiatives.
* Oversees the creation of segmentation plans, and communication lists.
* Supervises and provides direction to portfolio operations staff to ensure data as intelligence strategies are highly successful in informing the portfolio objectives and actions, the portfolio is supported with a highly effective and accurate database system, policy is developed and enforced to the safe and secure use and transfer of data with other areas of the University and external bodies, and in the production of key metrics reports, lists, data mining activities, query development, and other analytical and routine reports, as well as the information gathering, analyses and reporting for various University and government reporting requirements (OUAC, AUCC, CRA, etc.). Ensures a high degree of data quality and effectiveness through appropriate coding architectures, the development, promotion, and analysis of data entry policies and procedures, and ongoing training and coaching of colleagues, staff, students, vendors, and volunteers. Recommends new ways to capture and code information.
* Develops and enforces policy to ensure the safe and secure use and transfer of data with other areas of the University and external bodies. Ensures the accuracy of data provided by other departments and external service providers and ensures effective integration into the necessary systems.
* Develops a highly responsive service environment, effectively prioritizing multiple internal and external requests, to meet deadlines with a commitment to accuracy and compliance.
* Working with the Associate Vice President, to ensures strong systems are in place to manage contact with donors and alumni utilizing Raisers Edge with policies, procedures and staff training plans to fully utilize portfolio systems

**Leadership of Digital & Broad-Based University Fundraising:**

* Responsible for directing the digital strategies for the University’s broad-based fundraising activities, as well as direct-mail and e-solicits.
* The Director is expected to develop the strategies based on analytics of metrics from previous appeals and industry trends. Testing, analyzing, and revising strategies will aid in donor acquisition and retention.
* The Director will work closely with the Development Communications Officer and the Director of Alumni Engagement, who will collaborate on preparing the compelling creative needs to raise unrestricted dollars based on the developed strategies. Annual targets will be set in consultation with the Associate Vice President.
* Supervises and provides strategic direction to the communications support and list generation of the Digital Engagement Assistant.

##### Technology Systems, Web Performance & Digital Communications:

* Assumes primary responsibility for the portfolio’s computing environment, including information processing, hardware and software system performance and integrity, technological/procedural standards, and cost-effective administration of human/ financial resources and computer facilities. Analyses and implements hardware/software/application/office management requirements (over and above University IT systems); develops technical evaluations and specifications; and implements temporary or permanent upgrades and solutions. Develops and oversees written policies and procedures, produces documentation and manuals and documents inventory of system resources. Ensures maintenance of related servers and computer equipment.
* Supervises and provides strategic direction to the Data Admin and Analyst to ensure the portfolio CSM and database are highly effective in response to ER&A’s objectives, with sound information gathering and capture, compliancy, and secure.
* Works closely with the Director, Alumni & Donor Engagement, and the Associate Vice-President to ensure the functionality of the website(s) meets the portfolio’s needs. Web performance needs to be efficient and effective for successful events and philanthropic efforts. Ensures the appropriate gift acknowledgements for on-line giving.
* Provides strategic input and collaborates with portfolio staff, Marketing & Communications, and other University units to ensure an effective web presence and digital communication platform.
* Engages stakeholders to define clear goals for IT projects. Directs, negotiates and collaborates with Trent Information Technology department staff, external vendors, and contractors to develop and maintain custom or purchased hardware/software packages. Provides project leadership, ensures contract deliverables are met and compliant with vendor agreements and University regulations, and that project objectives and deadlines are met.
* Establishes and continually monitors application security procedures to guard against unauthorized access, protect records, safeguard confidentiality while enabling appropriate data access and ensure compliance with vendor agreements. Responsible for network administration (i.e. assigning and denying systems access) for delegated areas across the portfolio and University.
* Analyses, develops, maintains, and monitors systems, policies, procedures and training to ensure compliance with regulatory requirements related to Advancement Services: CRTC, PIPEDA, FIPPA, CASL, PCI, AODA, etc. Conducts third-party audits of vendors and service providers as appropriate.

**Prospect Research & Portfolio Analytics:**

* Supervises and provides strategic leadership direction to the Manager, Prospect Research & Donations to establish and monitor procedures for collecting, recording, coding, rating, analyzing, and reporting on prospects, alumni, donors and other key stakeholders in order to ensure current and accurate biographical, relational, interests, and giving information. Identifies and ensures appropriate tools and services, within budgetary requirements, to maximize prospect identification and qualification, such as the purchase of lists, vendor services, access to grant databases, custom analysis of the donor database, and other data intelligence techniques.
* With direction from the AVP, and collaboration with the Director, Alumni Engagement & Services, develops systems, procedures and reports to track progress of fundraising and engagement (e.g. moves management, pipeline and campaign reports etc.), report to donors (e.g. campaign impact and endowment reports), and measure alumni and community engagement.

**Donor & Volunteer Stewardship:**

* Directs and oversees work of the Stewardship Manager and other staff who are responsible for all donor and volunteer stewardship activities: ranging from liaising with departments, drafting donor agreements, providing detailed endowment reports, creating donor recognition opportunities and events.
* Directs and oversees activities related to stewarding all donors including Trent’s most philanthropic individuals, corporations, and foundations.
* Directs the stewardship activities of volunteers across the University.

**Financial Services, Allocations, & Cost Recovery:**

* Supervises and directs the Donations Office management to develop the most effective and compliant practices in daily donation input and reporting, receipting, bank deposits, monthly payroll deductions, pre-authorized transactions, processing gifts in kind and securities, procedures for fund reconciliation and allocation, and procedures for production run streams (parameter-driven user programs) to produce financial reconciliation reports. Ensures goals for internal/ external service, and accuracy are met.
* Directs and oversees online and digital donation financial transaction processing and advises and oversees the practices of other University units regarding the receipt of charitable donations and fundraising solutions. Works with colleagues to explore and recommend new giving platforms and strategies to meet donor needs, or support fundraising activities throughout the institution, such a text-giving, crowdfunding etc.
* Ensures and oversees procedures and data validation for annual audit, annual reports, Charity Information Return (T3010) and cost of fundraising calculations, campaign reporting, CASE standards, etc. Provides support to other University units in these matters.
* Ensures and oversees procedures and reporting on pledge status, fulfilment, and renewal rates, etc. Develops and oversees procedures for processing, validating, monitoring, and reporting on cost-recovery transactions, including quarterly progress and annual reconciliation with Finance (in collaboration with Vice President).
* Oversees the fund allocation process (including bi-monthly allocations meetings with portfolio and Finance department staff) and procedures for fund reconciliation. Ensure appropriate utilization of donated funds in accordance with donor designation by collaborating with Advancement team members and clear communication/ reporting with recipient departments.

**Managerial, Administrative, & Staff Leadership Responsibilities:**

* Develops, implements, monitors, and reports on the Portfolio Operations’ annual strategic and operating plans and budget, with a constant view to cost efficiencies, and leads the Advancement Services’, Prospect Research and Stewardship teams in accomplishing of these objectives.
* Hires, trains, develops, reviews, supervises, and directs the Portfolio Operations staff (Stewardship Management, Advancement Services, and Prospect Research). Assigns responsibilities and revises job descriptions as required. Make recommendations to AVP on changes to portfolio staffing mix in consideration of performance issues, changing and emerging needs, within budget constraints.
* Sets and monitors high standards for customer service, accuracy and confidentiality.
* Maintain strong knowledge of relevant rules and regulations, ensuring Trent adheres to all requirements including CRA receipting and gift acceptance practices, T3010 submission, and lottery licenses as applicable. Provide assistance to internal departments (e.g. academic programs, library, athletics) in these matters.
* Provides input for the development of portfolio objectives and short and long-term strategies/plans, and for budget preparation and administration.
* Represents the portfolio on various internal committees (e.g. IT Steering Committee, CASL Committee, etc.), and externally represents the University in various bodies (e.g. Advancement Peer Group).
* Maintains an active understanding of trends and best practices in Advancement, liaises regularly with other universities and non-profit sector organizations to exchange information about best practices, policies, procedures, and system processes.

#### Education Required:

Master’s Degree in Computer Science or a related discipline, as well as post-secondary executive-level education in core competencies; finance/accounting, project management, human resource management, etc.

#### Experience/Qualifications Required:

1. Minimum of 10 years of information management and strategy development, project management, data analytics, and technology management.
2. 8+ years of directly related experience in fundraising operations, donor management, and fundraising strategies, including applicable financial services experience. Experience in institutions of higher education an asset.
3. Expert knowledge of Blackbaud’s database and website products, Raiser’s Edge and Net Community experience are essential.
4. Record of providing leadership, training, coaching and organization skills to motivate and retain staff toward providing excellent service and delivering productivity on objectives and results, and through mass systems and organizational projects and change situations
5. An entrepreneurial spirit and a pro-active approach to problem-solving.
6. High commitment to accuracy
7. Excellent judgement in situations requiring initiative and tact.
8. Proven skills and ability to manage multi-phase projects from inception to completion.
9. Demonstrated ability to work independently and as part of a team.
10. Excellent organizational, interpersonal, verbal and written communication skills.
11. Experienced in handling sensitive and confidential information, situations and issues.
12. Detail-oriented, well-organized, focused and goal-oriented, with both initiative and energy.
13. Proficiency with MS Office (Word, Excel, PowerPoint), internet tools.
14. Flexibility to work occasional evenings and weekends.
15. Criminal Records Check (dated within the last 6 months) will be required as a condition of employment.

#### Supervision:

Recruit, orient, train, direct, manage and evaluate the performance of:

* X-299 Manager, Philanthropic Stewardship
* A-267 Team Lead, Research & Donation
* X-389 Stewardship Officer, Donor & Volunteer Relations
* A-381 Digital Engagement Coordinator
* SO-207 Donations & Research Associate
* A-332 Database Coordinator

**Job Evaluation Factors:**

**Analytical Reasoning**

The position requires highly complex analytical reasoning skills and the ability to render reasoning through multiple layers of complex variables. Only minor repetition daily and multiple impact considerations required in many circumstances. Requires high volume of retained detailed information to be applied to reasoning scenarios. Examples:

* Highly complex analytical reasoning is required to design and maintain systems, develop meaningful reporting and information management strategies, analytics and data mining development and technological environment troubleshooting.
* Ability to analyse the sector to determine best digital fundraising strategies.
* A high-level of recall of knowledge from diverse areas of know-how and past scenarios are required to be applied to analytical reasoning in the form of program and systems management, broad-based fundraising digital strategies, donor and volunteer stewardship, development and troubleshooting, including operational and resource planning and budget management, staffing, allocations management, fund reconciliation, financial services, and special project management
* Substantive reasoning is required to define and develop effective and compliant policy and procedures which strongly align with objectives and make the best use of human resources. E.g., how to design and implement an opt-in or opt-out system to meet donor preferences, but not unduly limit the ability to communicate with our stakeholders.
* The role involves understanding complex technology, systems and applications; complex analysis, coding and retrieval of data, and the ability to mentally review detailed and layered cause and effect scenarios. Understanding of sector technology trends to determine best use and getting ahead of the charitable competition.
* Understanding user needs and developing solutions that may not yet exist; developing training to meet user requirements (direct and indirect or anticipated)
* Analysis, verification and validation of data from other sources; evaluation of system vulnerabilities as well as 3rd party audits
* Review of complex regulatory, contractual, and technical documents.

**Decision Making**

Complex decision making is a routine requirement for the role from the perspective of systems troubleshooting, ongoing development and design, meeting multiple and sometimes conflicting needs, and regulatory compliance. The Manager, Advancement Services & Stewardship is required to make quick but high impact decisions sometimes with little input from others, often due to lack of comparable technical understanding. Furthermore, substantial negotiation, problem-solving and decision-making with staff in the portfolio and across the university is required, as well as with external contractors and stakeholders.

* Impact analysis decisions on hardware and software, applications, modules, coding practices, etc.
* Determining appropriate stewardship recognition for a wide-range donors when new opportunities arise (ie. New buildings, campaigns)
* Ongoing risk assessments of systems, data transfers, confidentiality, access etc.
* Long-term relationship negotiation and decision-making with colleagues, stakeholders (departments, volunteers, etc.), and suppliers.
* Experience, discretion, tact, and judgment are required.
* Judgement in bringing forward key system, stakeholder, information, or financial issues to the Vice President and senior management team where there may be limited understanding of the technical issues but a need to meet specific goals.

**Impact**

The role has substantial impact on university fundraising objectives, long-term community, alumni and donor relationships, and staff productivity. Technology and data-analytics are driving our decisions.

* Providing timely and accurate information to the teams is essential to fundraising and engagement efforts. Issues of incorrect financial information could lead to trust issues with the board and reputational damage.
* Issues with meeting our unrestricted fundraising goal would lead operational budget shortfalls.
* Effectiveness and responsiveness of information and technical systems directly impacts portfolio staff productivity, accuracy and timeliness of communication with stakeholders, and the ability to build and manage relationships productively.
* Responsible for securing the data of 150,000 constituent records including more than 50,000 alumni and 20,000 donors. Security breaches or incorrect management of data have serious consequences and can lead to inaccurate reports, contact mismanagement, lost revenue, lost confidence, and reputational damage.
* Poor decisions on hardware and software can cause negative budgetary and program impacts and lasting issues.

Issues with regulatory compliance can lead to institutional penalties

##### Indirect Responsibility for the Work of Others:

##### Oversight of staff across the portfolio (systems work)

##### Liaise with, train and support other University staff work (academic department liaisons-data & communications, Information Technology- systems, Finance- fund management, Athletics- donations etc.)

##### 3rd party vendors

##### Communication

##### Internal:

##### Development Office – systems and procedural direction, human resource communications, data lists, reports, analytics, events, research, training, etc.

##### Alumni Office – systems and procedural direction, data lists, reports, analytics, events, research, training, etc.

##### Community Relations – contact lists, event details, coding

* Government Relations – providing financial information
* Marketing & Communications – website coordination and strategy, communications planning, contact lists, web links and coordination
* Financial Aid – fund direction and details, student recipients
* Finance – fund allocations, reconciliation, audits, tax reporting, regular data transfer, annual reports, Charity Information Return
* Graduate Studies – alumni upload, financial fund details, student recipients
* Academic and administrative departments – data requirements, lists for surveys, financial reports, etc.
* Information Technology – systems design and direction, servers and systems maintenance, security and program issues, etc.
* Human Resources, Athletics, Registrar – data transfer and capture strategies, upload on student information, staff and faculty contact information, funding coordination etc.

##### External:

##### 3rd party vendors, affinity partners,

##### Vendors and service providers

##### Other university contacts

##### Motor/ Sensory Skills

##### Keyboarding & mouse manipulation - Computer usage impacts on 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, presentations, training, identification of needs, etc.

##### Effort

##### Mental:

##### Sustained concentration, focus, memorization, recall, intensity:

##### Program and project planning; managing competing and urgent internal and external priorities

##### Budget and HR management

##### Software and hardware implementation and troubleshooting

##### Verification of reports and lists and coding, data analytics

##### Fund reconciliation and administration, producing endowed fund data

##### Correspondence, reports

##### Interacting and negotiating with donors, volunteers, etc.

##### Physical:

##### Stairs – Access to second floor and basement of Mackenzie House.

##### Lifting - Moving heavy computer equipment and monitors

##### Agility – to get underneath or behind furniture to access data jacks and backs of computers

##### Significant periods of time spent keyboarding, reviewing data onscreen, and also in meetings

##### Working Conditions

##### Physical:

##### Climbing stairs within Mackenzie House

##### Long periods of time spent keyboarding, in meetings

##### Psychological:

##### Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks

##### Financial accountability

##### Staff change management relating to daily activities and procedures

##### Responsibility for the primary computing environment, direct responsibility for the data security of information held and exchanged with external parties.

##### Reputational risks stresses related to data security, confidential exchanges etc.