(PD-1091) Events and Stewardship Coordinator

**POSITION INFORMATION**

- **Internal Team:** SL-University Development-137500  
- **Job Code/Employee Classification:** Admin Support Coord 12 Mo
  
  **Job Code:** 1035

- **MPP Job Code:**
- **Position Number:** No position selected.

- **CSU Working Title:** Events and Stewardship Coordinator
- **Reports To:** Executive Director of Donor Relations
- **Campus:** San Luis Obispo
- **Division:** University Development
- **College/Program:** UD-Donor Relations
- **Department:** UD-Donor Relations - 201300
- **FLSA Status:** Non-Exempt

**SENSITIVE POSITION**

- **Sensitive Position:** ☐ Yes  ☐ No

- **Job Summary/Basic Function:** Under the general direction of the Director of Donor Relations, the Events and Stewardship Coordinator performs specialized activities to enhance donor relations through special events, communications, and stewardship for University Development and the Office of the President.

- **Minimum Qualifications:** High school diploma or its equivalent. Type 45 wpm. Four years of general office support or technical experience. (Training at a vocational school or full-time college education may be substituted for two years of the required experience on the basis of one year of college education for 6 months of experience)
Required Qualifications:

- Demonstrated ability to use standard office equipment.
- Ability to interact, collaborate, and communicate effectively with individuals at levels on and off campus.
- Is able to build partnerships and work collaboratively with others to meet shared objectives.
- Is able to communicate clearly and effectively, both verbally and in writing, to a variety of audiences.
- Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
- Has thorough mastery of English grammar, punctuation, and spelling.
- Is able to take on new opportunities and tough challenges with a sense of urgency, high energy and enthusiasm.
- Is able to effectively handle interpersonal interactions at all levels and handle highly sensitive interpersonal situations.
- Is able to interpret and apply policies and procedures independently, and use judgement and discretion to act when a precedent does not exist.
- Is able to perform business math, analyze budgetary data, and make accurate projections requiring some inference.
- Excellent organization and time management skills with the ability to set own priorities to coordinate multiple requests and assignments and fluctuating and time-sensitive deadlines.
- Excellent computer skills and proficiency with a variety of computer applications including wordprocessing, spreadsheets, databases, online systems, Internet as well as online calendaring and email.
- Is able to use negotiation and persuasion to achieve results and expedite projects.
- Is able to organize and plan work and projects including handling multiple priorities.
- Is able to gain the confidence and trust of others through honesty, integrity, and authenticity.
- Has thorough knowledge of policies, procedures, and outside regulations pertaining to the program/specialty.
- Ability to recommend creative solutions while ensuring compliance with established University policies and procedures.

Preferred Qualifications:

- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience with Ellucian Advance database, PowerPoint, Word, Excel.
**Special Conditions:**

- Must be willing to travel and attend events and training programs off-site.
- Must be able to work overtime, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
- Must be willing and able to transport, set up and clean up materials for on-campus and off-campus events.
- The person holding this position is considered a ‘mandated reporter’ under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 Revised July 21, 2017 as a condition of employment.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position classification has been defined as non-exempt and is subject to overtime provisions of the Fair Labor Standards Act (FLSA).

**License / Certification:**

- Possession of a valid driver’s license or the ability to obtain by date of hire.

**Mandated Reporter:**

- Limited - The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

**NCAA:**

- [ ] Yes  [ ] No

**Conflict of Interest:**

- None

**Supervises Employees:**

- [ ] Yes  [ ] No

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**Job Duties**
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<tr>
<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
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Work collaboratively with the Office of the President, campus leadership and the colleges and units in planning and coordinating development and donor-related special events that enhance relationships between alumni, parents, and friends of the university.

Coordinate and represent the university, President, and key leadership at development events, on and off-campus as mandated by the university and in accordance with the changing needs of the university.

This includes developing, planning, scheduling and implementation of development events hosted or attended by the President, the President's spouse and/or key leadership with a focus on the university's Green and Gold Giving Society members ($100K+ lifetime donors).

Prepare confidential briefing packets for the President and key university leadership for each event outlining objectives and overview, bios on attendees of note, talking points, and additional pertinent information important to the success of overall event strategy (in collaboration with the Donor Relations Stewardship Coordinator).

Plan, implement and evaluate development event programs, including, but not limited to: budget oversight, communications, printed materials, content, programs, agendas, decoration, vendors, speakers, stewardship activities, technical needs, travel, transportation, catering, schedules and staff support.

Engage prospective and current donors and key constituents by promoting the Cal Poly brand to celebrate student achievement consistent with Cal Poly's “Learn by Doing” philosophy.

Build and maintain relationships with key constituencies, including but not limited to: Green and Gold Giving Society members, university board members, Retired Faculty and Staff, alumni, parents and friends of the university.

Manage event registration process, including but not limited to: invitation outreach, regular communication with guests during RSVP and registration process, RSVP tracking, recruitment and training of additional registration staff for larger events, and utilization of event registration and seating software to accurately and efficiently monitor guest attendance.

Arrange and conduct personal campus tours for high level campus guests as requested by the President, University Development leadership or donors.

Develop and implement event forms, workflow documentation, and update events protocols, policies and procedures.

Manage the University Development master calendar of events.

Monitor event budget and obtain estimates from vendors/catering for related events, elevating concerns and discrepancies accordingly.

Inspect invoices and approve event expenses for payment and ensure the costs remain within budget and are in accordance with University and Foundation policy.

Work with Contracts and Procurements to establish purchase orders, ABC licenses, contracts, and appropriate insurance and licensing requirements.

Supervise student assistants.

Improve donor database by sending biographical updates to Development Support Services and code attendance of all development events as an indicator of engagement.

Prepare documents for final mailings, including creating mail merges, obtaining signatures, etc.

Organize and maintain event files, supplies, equipment, and storage areas.

Assist with implementation of the donor communications and marketing stewardship program, including services and communications related to events, to continue engagement and ongoing giving.
Work collaboratively with Stewardship Coordinator to create individual donor stewardship communications and marketing plans.

Under general supervision, assist with the maintenance of our comprehensive gift club programs, including tracking new donors and ongoing gift club communications to external audiences.

Write and copy edit a variety of donor communications including correspondence, invitations, brochures, event proposals and scripts, PowerPoint presentations, and reports.

Research and write gift acknowledgment letters for signature including letters on behalf of the President, the University Development leadership, and Foundation Board Members.

Assist with research initiatives.

Provide input for the development and implementation of plans for specialized reporting to donors, such as annual donor impact reports, personalized stewardship plans, and honor rolls.

Arrange for services with outside vendors such as free-lance writers, photographers, and various production services; help select vendor on basis of cost and quality of services offered.

Draft other donor correspondence and various documents on behalf of the Office of the President and University Development leadership.

Prepare donor and host gifts and acknowledgments as needed. Maintain donor closet inventory.

Engage in professional development, seeking best practices from around the nation to enhance donor and volunteer relations programs to support the comprehensive campaign using a donor-centered model.

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**USERS AND APPROVALS**