

## UW HEALTH JOB DESCRIPTION

### STEWARDSHIP COORDINATOR

Job Code: 320001	FLSA Status: Exempt	Mgt. Approval: T. Whitehorse	Date: March 2022
Department: UW Health Development		HR Approval: B. Haak	Date: March 2022

### JOB SUMMARY

The Stewardship Coordinator for Principal Gifts is a key team member of the donor engagement and stewardship initiatives of the Principal Gifts team. This role operates independently and works in partnership with development colleagues, donors and key clients to develop and execute stewardship and fundraising initiatives that support UW Health, SMPH, UW Foundation and the Medical Advancement Group. The Stewardship Coordinator will accomplish goals through project planning, management, and execution to ensure donors feel appreciated and informed about the impact of their gift(s).

The Stewardship Coordinator also supports and executes strategic philanthropic stewardship activities, engagements and events for principal gift donors. Responsibilities include the development and execution of stewardship activities and engagement strategies for principal gift donors, to include the management and distribution of allocated assets.

The Stewardship Coordinator provides operational and staffing support to Friends of UW Health.

### MAJOR RESPONSIBILITIES

#### **Development and execution of stewardship activities and engagement strategies for donor relations:**

1. Work with directors of development and program manager to implement, execute and manage new opportunity for engagement and stewardship of Principal Gift donors.
2. Responsible for writing, planning, implementing, and executing a variety of cultivation, recognition and engagement activities, and communication.
3. Responsible for project management of tasks for principal gifts by way of entering strategy plans, stewardship plans and updates in donor and project management platforms.
4. Responsible for documentation, tracking, monitoring stewardship and engagement strategy and activity in database (ABE).

#### **Provide leadership support to Friends of UW Health and serve as ex-officio board member in collaboration with the UW Health Liaison to Friends of UW Health.**

1. With knowledge of UW Health strategic goals and defined project goals, make recommendations for appropriate activity, event style, scale, venues, budget and reach. This includes ensuring communication of news and changes within UW Health, providing adequate resources to support volunteers' activities, and showing the organization's appreciation of their efforts.
2. Effectively manage multiple small to large-scale projects and events throughout the year and successfully meet project deadlines.
3. Manage event logistics and create event procedures to coordinate the integration of multiple vendors, volunteers and other key players to ensure seamless execution of event plans to support the guest experience. Effectively and creatively solves problems on site.
4. Provide and coordinate marketing, communication and social media support to Friends of UW Health's event and board activity.
5. Staff and provide administrative support to monthly board and executive committee meetings, as well as serve on project committees.
6. Manage volunteer board membership in accordance with membership bylaws and coordinate onboarding new members.
7. Process payments; manage deposits according to policies and guidelines; produce follow up communications to donors including invoices and receipts. Negotiates and manages vendor relationships and contracts and works with appropriate staff to ensure timely payment.
8. Monitor financial reports, sponsorship and in-kind donations to ensure accuracy and compliancy; and work with the treasurer(s) to compile required records for the completion of the Friends audit.
9. Coordinate Friends' grant program with key internal stakeholder groups. Ensure funding requests are consistent with organizational strategic plans and support patient and family centered care services.
10. Oversee Friends' involvement with the UW Health gift shops, including guiding Friends' branding in the stores, monitoring financial results, promoting store activities through Friends' communication channels, and developing strategic plans.

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**ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.**

### JOB REQUIREMENTS

Education	Minimum	Bachelor's degree in Business, Public Relations, Marketing, Communications, Healthcare Administration, or another related field.
	Preferred	
Work Experience	Minimum	<ul style="list-style-type: none"> <li>Three (3) years relevant experience in a development, event planning, and/or communications</li> <li>Experience managing medium to large scale projects.</li> </ul>
	Preferred	Five (5) years management experience in fundraising
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>Strong written communication skills</li> <li>Strong interpersonal skills with a demonstrated ability to effectively build partnerships with diverse groups of people.</li> <li>Demonstrate ability to work independently and make informed decisions while also displaying an enthusiasm for learning and confidence to ask questions.</li> <li>Ability to manage large scale projects.</li> <li>Ability to influence without direct authority</li> <li>Database expertise, ABE preferred</li> <li>Demonstrate attention to detail including exceptional proofreading</li> <li>Time management skills with ability to perform under deadlines</li> <li>Understanding of and respect for confidential information</li> <li>The ability to apply sound judgement in all situations is requirement, as are excellent organizational skills with thorough attention to detail</li> <li>The ideal candidate will be highly motivated, professional team player with outstanding interpersonal skills and an excellent customer service attitude</li> <li>Cultivate and maintain positive relationships with colleagues, individual and corporate donors, sponsors, vendors and leaders</li> <li>Effective and creative problem solving</li> <li>Knowledge of donor engagement and stewardship best practices preferred</li> </ul>

### PHYSICAL REQUIREMENTS

**Indicate the appropriate physical requirements of this job in the course of a shift.** *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

Physical Demand Level		Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
<b>X</b>	<b>Sedentary:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	Up to 10#	Negligible	Negligible
	<b>Light:</b> Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree.	Up to 20#	Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	Negligible or constant push/pull of items of negligible weight
	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	20-50#	10-25#	Negligible-10#
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	50-100#	25-50#	10-20#
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	Over 100#	Over 50#	Over 20#

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<b>Other</b> - list any other physical requirements or bona fide occupational qualifications not indicated above:	
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Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.