



# Executive Director, Donor Relations & Stewardship Boston, MA

Boston University (BU) seeks a forward-thinking and collaborative Executive Director, Donor Relations & Stewardship to provide strategic leadership in the design and implementation of an integrated, comprehensive donor experience program. Bringing a holistic view of people, systems, and resources to Development and Alumni Relations (DAR) and stakeholders across BU, the Executive Director will build community around the essential role that donor relations and stewardship plays in building trust, advancing relationships, demonstrating the impact of support, and sparking connection with BU donors in ways that inspire confidence and future philanthropy.

BU has charted a stellar ascent in recent years. Now ranked #41 by *U.S. News and World Report*, the university comprises 17 Schools and Colleges, including highly ranked graduate schools such as the School of Law, School of Business, School of Education, and College of Engineering. Founded in 1839, BU has always been a hub for innovation and inclusive community-building. As one of the largest independent nonprofit universities in the country, it was the first university to open all divisions to female students in 1872. BU created one of the first study abroad programs, and, today, about one third of the university's 36,809 students come from countries outside the United States. This diversity is one of the greatest institutional strengths of BU, underpinned by the university's commitment to creating community—one of the pillars in the <a href="Strategic Plan">Strategic Plan</a> for 2030, which will form the foundation for an upcoming comprehensive campaign. The five guiding university priorities are: ensuring a vibrant academic experience; diversity, equity, and inclusion; producing research that matters; creating community, big yet small; and fostering global engagement.

Reporting to the Vice President for Development, the Executive Director (ED) works closely with DAR colleagues and across BU's schools, colleges, and centers to determine their donor relations and stewardship needs and provide strategy, guiding resources, and tools for the implementation of standardized and tailored donor communications and experiences that support BU's comprehensive and annual fundraising campaigns. In addition, the ED partners with DAR senior leaders, the president's office, and communications teams on major campus fundraising initiatives to determine the most compelling messages to present to the public and to donor audiences, and develops key metrics to provide insights that will drive strategy for engagement and fundraising success.

This is an exciting opportunity for a confident and innovative leader to join an institution at the outset of a campaign that will propel ever-more ambitious achievements. The ED leads a team of at least ten professionals and a program that includes gift acknowledgements, endowment and impact reporting, university-wide giving societies, donor and scholarship stewardship, fund development and utilization, and a variety of high-impact donor experiences, including DAR events. With an attentiveness to improved performance and systems efficiencies, the ED will work closely with alumni engagement and advancement services colleagues, as well as with stakeholders across the university, including those in the Offices of General Accounting, General Counsel,



and Financial Assistance to create high-functioning workflows and mutually beneficial approaches for key interrelated processes.

The ED will be a passionate advocate for innovative donor relations practices, comfortable leveraging both broad-based digital and highly personalized, individual engagement strategies to enhance BU's connection to and relationships with donors. The ideal candidate will have at least 10 years of experience conceiving and managing innovative behavior-based donor relations and stewardship programs, ideally in complex institutional environments. They will demonstrate excellent project management skills and the ability to work collaboratively with colleagues and internal and external business partners. They will be creative, strategic, and possess skills and experience in systems/process development to help structure and focus the work of a busy team. The next ED is collaborative, data-driven, and organized, bringing a collegial, team-building style with a demonstrated ability to cultivate productive, collaborative relationships with DAR colleagues, faculty, and staff across the university. The successful candidate will be an inspiring leader and an effective advocate for all constituents. In accordance with its core values and mission, BU is especially interested in recruiting members of diverse communities and individuals with a commitment to multiculturalism.

# **Boston University**

Boston University is an international, comprehensive, private research university, committed to educating students to be reflective, resourceful individuals ready to live, adapt, and lead in an interconnected world. Boston University is committed to generating new knowledge to benefit society.

BU remains dedicated to its founding principles: that higher education should be accessible to all, and that research, scholarship, artistic creation, and professional practice should be conducted in the service of the wider community—local and international. These principles endure in the university's insistence on the value of diversity, in its tradition and standards of excellence, and in its dynamic engagement with the City of Boston and the world.

Boston University comprises a remarkable range of undergraduate, graduate, and professional programs built on a strong foundation of the liberal arts and sciences. With the support and oversight of the Board of Trustees, the university, through its faculty, continually innovates in education and research to ensure that it meets the needs of students and an ever-changing world.

# Josh Aiello

### Vice President for Development

Josh Aiello currently serves as Vice President for Development. He joined Boston University in 2013 and has held the roles of Assistant Dean for Development and Alumni Relations at Sargent College, Director of School Development, Assistant Vice President for School Development, and most recently, Associate Vice President for School Development. He proudly held leadership roles during the university's first comprehensive campaign, which concluded in September 2019, having raised a record \$1.85 billion in gifts from more than 175,000 alumni, parents, and friends.

Aiello has more than 15 years of experience in educational advancement and has served as the Executive Director for Development for Massachusetts College of Pharmacy and Health Sciences. Early in his career, the



focus of his career was on service learning and community service, having led emergency response efforts during major natural disasters.

Aiello received a BA from Saint Anselm College in Manchester, NH and an EdM from Boston University.

# Development & Alumni Relations at BU

With an endowment valued at approximately \$3.4 billion, BU has a legacy of endowment giving in support of faculty chairs and student scholarships. The university is currently raising approximately \$225 million in annual philanthropic support. There are approximately 345,000 known prospects and more than 400,000 living alumni; the alumni giving rate is approximately 10 percent.

BU's <u>Board of Trustees</u> and the university's executive leadership team are invested in the future of BU and are mobilizing for a comprehensive fundraising campaign, which is currently in the quiet phase. The last campaign for BU, *Choose to Be Great*, which closed in 2019, raised \$1.85 billion for the university.

Development & Alumni Relations (DAR) comprises a team of 255 professionals in principal, international, and major gifts, foundation relations, annual giving, alumni engagement, talent management, and operations, including stewardship, data analytics and applications, and prospect research and management. As BU prepares for another campaign, DAR is reinvigorating its approach to prospect management and analytics. DAR has recently added a Prospect Information Strategies team that is incorporating prospect analytics and predictive modeling to the work of DAR that includes information and process flows around prospect, portfolio, and pipeline development. They have also added resources to the leadership annual giving and donor experience teams, underpinning the major gifts pipeline with growth in the breadth and depth of the donor base.

DAR harnesses the power of philanthropy to make an excellent education accessible and welcoming to all, and to advance BU's global leadership in research, scholarship, artistic creation, and professional practice. To support their work, DAR has built—and is continuing to build—an outstanding team of dynamic, mission-driven advancement professionals who constantly strive to create an environment where everyone belongs. It's not just a job, but a career and a community.

#### DAR values:

- Teamwork, transparency, and mutual respect, because we value every member's contributions and know that leadership can come from anywhere
- Diversity, equity, inclusion, and a commitment to ensuring that each of us knows we belong here
- Integrity in how we work and how we treat one another
- Strategic thinking and curiosity in the relentless pursuit of fresh approaches and measurable results

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- Continuous growth and improvement, both as individuals and as a team
- Joy and shared appreciation for working hard toward goals that matter

To hear directly about what it's like to work in DAR at BU, visit: www.bu.edu/dar-talent/voices-of-dar.



## Executive Director, Donor Relations & Stewardship

Reporting to the Vice President for Development, the Executive Director, Donor Relations & Stewardship conceives of and directs the implementation of a comprehensive donor relations and stewardship (DRS) program that encompasses gift acknowledgements, endowment and impact reporting, university-wide giving societies, donor and scholarship stewardship, fund development and utilization, and creating a variety of high-impact donor experiences, including but not limited to DAR events.

Leading a DRS team of approximately ten professionals, the ED will evaluate the quality and impact of the donor relations/stewardship program and play an instrumental role in building and strengthening relationships across Boston University. In this role, the ED will lead the strategy for expanding the understanding (and role) of donor relations and stewardship across DAR and the university.

## **Essential Duties**

Develop innovative, strategic, and actionable plans for donor experience/engagement at various gift levels and types based on priority donor behaviors, with particular attention paid to those individuals and organizations whose philanthropy has had significant impact on BU. Reinforce targeted communications appropriate to various groups and develop strategies aimed at increasing retention and giving.

- Partner with prospect managers centrally and across BU's schools and colleges to develop and implement DRS strategies that blend stewardship and cultivation with offerings that strengthen longterm relationships with major donors. Ensure that details of stewardship frameworks and plans are communicated, accessible, and documented—taking the guesswork out of what resources are available for frontline officers and reducing ad hoc requests of DRS staff. Simplify processes with the aim of making space for more creative and tailored donor engagement.
- Devise strategies for meaningful donor recognition via custom impact communications for individual supporters, impact pieces for broad audiences, recognition for capital project donors, and other tactics that convey the impact of giving.
- Provide input on donor experience and communications for donors of the highest level, working closely with the Offices of the President and the Senior Vice President, DAR and in alignment with the VP and AVPs. Help develop individualized stewardship plans for donors at the principal gift level including individualized and small group/cohort donor engagement. Be attuned to the unique and varied ways that principal gift donors advance and are connected to BU's achievements—from financial support to advisory appointments and campaign-related volunteer leadership. Bring a holistic and coordinated approach to the donor experience that maps acknowledgements, impact reporting, and donor experiences to key milestones, relationships, and cultivation strategies.

Oversee all aspects of endowment fund reporting, gift agreements, presidential acknowledgments, and related correspondence, as well as leading donor recognition strategies.

• Develop digital platforms, tools, and workflows that encourage productive relationships with faculty members and frontline officers and orient them to impending reporting requirements and milestones.



Provide insights into how the structure of transformative gift agreements may require tailored activities that will necessitate additional staffing or resources.

- Serve as a key partner with DAR leaders, development officers, BU general accounting, BU financial assistance, and partners in colleges and units to ensure BU's scholarship fund stewardship practices are best-in-class and provide donors with meaningful and individualized information regarding scholarship awards. Partner with advancement services to ensure that BU technology platforms and business processes support BU's scholarship stewardship goals.
- Promote an approach to gift agreements that centers on building trust for all parties involved. Ensure
  that all new agreements drafted for commitments of \$100,000 or more reflect the intersection of
  donor interests and the university's needs, both near and long term. Confirm that all funds tracked by
  DRS (including endowed and relevant term funds) are used according to their purpose, working with
  appropriate departments, and that any errors are identified and corrected.
- Work with colleagues in advancement services as well as with BU general counsel and general accounting to ensure BU's gift acceptance and stewardship practices follow industry best practices.

Align DRS strategies and approaches with those of DAR colleagues for a robust donor experience that sparks connection with BU and meets audiences where they are in their philanthropic journey.

- Partner with senior leaders, campaign, and strategic initiatives colleagues to ensure that "big ideas" and other key elements of the campaign framework and university strategic plan are woven throughout the donor experience.
- Collaborate with colleagues to create synergies and align strategies and roadmaps for shared donor
  experiences and philanthropy-focused marketing and communications opportunities. Serve as a
  strategic partner on individual/cohort engagement strategy elements with key DAR team members,
  including signature campaign events, transformative gift announcements and donor event(s), giving
  societies (e.g., the 1839 Society) and related events and programming, roundtable discussions, unique
  donor events related to named opportunities and the completion of capital projects, or significant
  moments for the BU community.

Promote a collaborative, strategic, high-performance environment for the DRS team that is solutions- and impact-focused, rather than primarily measured by outputs.

- Evaluate the effectiveness of all donor relations activities and suggest adjustments to the program on an ongoing basis. Determine the overall framework for what activities are centralized in DRS or distributed throughout BU's schools and colleges.
- Provide overall leadership and direction to the team, creating a culture of trust, accountability, and transparency. Coach, mentor, and support direct reports in the successful day-to-day management of the team.
- Work with each staff member to set mutually-agreed-upon goals, performance management metrics, budgets, hiring plans, and personnel management. Ensure that individuals have a sense of responsibility and ownership for the successful outcome of the organization.
- Maintain a leadership style that is open and fluid, and capable of inspiring, empowering, and motivating staff. Foster a work environment that recognizes and rewards performance, supports new



ideas and risk-taking, builds confidence, encourages interaction and teamwork, and promotes diversity. Serve as an advocate for staff, representing their needs and concerns.

Apply innovative technology solutions to make information and resources accessible in ways that empower DAR colleagues in their work and enhance donor experiences.

- Work in tandem with advancement services to ensure that DRS frameworks and resources are
  available through the CRM platform and that best practices are introduced to support key data
  tracking, knowledge, and analysis. Ensure that primary points of contact for questions and projects
  are highlighted. Leverage data to enhance and streamline workstreams.
- Expand upon the functionality of the successful deployment of BU's digital reporting platform for endowed gifts.
- Collaborate in creating online content that supplements or enhances donor experience or recognition efforts.
- In partnership with advancement resources and talent management—and with the support of advancement services—develop training/learning modules and best practices that provide overviews of critical DRS programs for the onboarding of new staff members and effective partnership with existing colleagues.

# **Experience and Qualifications**

The ideal candidate will bring many of the following professional qualities and experiences:

- A minimum of ten years of progressively responsible managerial experience in donor relations and stewardship in support of fundraising, preferably within the higher education, large nonprofit, or healthcare sectors.
- Expert knowledge of best practices, strategies, and metrics in all key areas of donor experience and communications; ideally within the framework of a comprehensive and large-scale capital campaign in a higher education setting. Ability to cocreate and design new initiatives.
- Knowledge of scholarship award management in a higher education environment; prior experience in scholarship stewardship and endowment reporting.
- Ability to communicate and translate ideas into action and a clear understanding of how to organize and disseminate information that inspires engagement.
- Excellent communication skills and prior experience working collaboratively with creative teams to produce high-impact donor communications.
- Experience working with technology and data teams to develop processes and tools to effectively manage a donor relations program.
- Familiarity with implementing digital tools to simplify, visualize, and share complex information.
- Proven experience and success managing complex projects on ambitious timelines.
- Ability to combine strategic planning and project management skills in identifying, analyzing, developing, and implementing short- and long-term strategies, approaches, metrics, and incentives.
- A sharp eye for operational efficiency and the best use of resources, including a demonstrated understanding of budgets and the ability to manage them.



- Experience working collaboratively with cross-institutional partners including executive leaders, development colleagues, volunteer leaders, and donors.
- Ability to serve as a donor relations subject-matter expert and advisor to partners across the university.
- The political savviness to navigate a complex academic community; the desire and ability to build bridges and strong collaborative relationships with all members across the enterprise and diverse alumni and constituents. An interest in serving as a resource to others and obtaining their input; persuasive, persistent, and determined.
- Proven management skills in building a high-performance fundraising team and a goal-oriented environment that empowers staff members through active communication, personal accountability, and delegation and that builds confidence, promotes diversity of thought, and celebrates achievements. Must have a history of recruiting and developing exceptional people.
- Extensive event management knowledge, including both large-scale formal events and smaller events like receptions and dinners.
- Familiarity with Salesforce, CRM, or similar donor databases is preferred.
- Proficiency with Microsoft Office, specifically Word and Excel.
- A bachelor's degree is required.

#### Location

This is a Boston-based position. BU's campus is located in Boston's Fenway-Kenmore neighborhood. Nestled between the beautiful Charles River and historic Fenway Park (home of the Boston Red Sox), BU's location is ideal for a healthy contemporary lifestyle. Boston is a vibrant city steeped in history with diverse neighborhoods, a rich arts and culture scene, and a legacy of education, innovation, and ideas.

DAR provides a hybrid work schedule, offering employees the opportunity to work two days per week from home, if circumstances allow. More information about the university's remote work policy is available here: www.bu.edu/hr/lifebu/remote-work.

# Compensation

Compensation is highly competitive and budgeted in the range of \$165,000 - \$185,000 annually, depending on experience. Boston University offers a comprehensive benefits package, which adds significantly to the employee's total compensation.

# Interested in Learning More?

Boston University has partnered with Talent Citizen to assist in this recruitment. Please contact President Tracy D. Welsh, Senior Associate Rachel K. Partin, and Senior Associate Eva Kotilinek to share your resume and cover letter via email at: bu-eddrs@talentcitizen.com.

Boston University is an equal opportunity employer and gives consideration for employment to qualified applicants without regard to race, color, religion, sex, age, national origin, physical or mental disability, sexual orientation, gender identity, genetic information, military service, or because of marital, parental, or veteran status or any other characteristic protected by law.



If you require a reasonable accommodation in order to complete the employment application process, please contact the Equal Opportunity Office at 617-353-6474 or <a href="mailto:druckman@bu.edu">druckman@bu.edu</a>.

Please note all newly hired staff and faculty, will need to be in compliance with Boston University's COVID-19 Vaccination <u>Policy</u> within 30 days of date of hire. For further information on the university's response to COVID-19, please visit the <u>Back2BU site</u>.