Human Resources
POSITION DESCRIPTION (HR 120)

CLASSIFICATION: Administrative Support Coordinator II 
DEPARTMENT: University Development
WORKING TITLE: Donor Relations Events Specialist 
FLSA: Non-Exempt
INCUMBENT:

PURPOSE:

Founded in 1901, Cal Poly is one of only five comprehensive polytechnic universities in the nation, with approximately 18,000 undergraduate, 120 post-baccalaureate, and 900 graduate students. U.S. News & World Report has ranked Cal Poly #1 among public master's universities in the western United States for 22 consecutive years. Cal Poly is a residential campus, with an on-campus population of approximately 7,000, primarily an undergraduate university, Cal Poly offers 66 baccalaureate and 27 master's degrees. The university is organized into six colleges with two-thirds of the university's students majoring in agriculture, architecture and environmental design, business, or engineering. Cal Poly is among the most selective universities nationwide; student quality is high, with applications significantly exceeding admissions. Accredited by the Western Association of Schools and Colleges, Cal Poly is a member of the Association of Public and Land-grant Universities and the American Association of State Colleges and Universities.

The University is located in San Luis Obispo, a city of 44,000, 12 miles from the Pacific Ocean and midway between San Francisco and Los Angeles on California’s scenic Central Coast. With excellent public education resources, recreational facilities and an expanding dedication to the arts, the area has an outstanding climate, with an annual average temperature of 70.2 degrees.

The role of the University Development Division is to foster strong relationships with internal and external partners to enhance support for Cal Poly. University Development oversees the development program areas of planned giving, principal gifts, prospect research, corporate and foundation relations, college and regional fundraising and alumni relations.

Under the general direction of the Director of Donor Relations, the Donor Relations Events Specialist performs specialized activities to enhance donor relations through communications, stewardship and special events. Additionally, this position supports the Office of the President and University Development with special events, donor recognition and stewardship projects.

DUTIES AND RESPONSIBILITIES:
The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

ESSENTIAL JOB FUNCTIONS

Donor Relations and Development Events

- Work collaboratively with the Donor Relations department and the Office of the President in planning and coordinating development and donor-related special events.
- Coordinate staff and represent the university and the President at Presidential development events, on and off-campus as mandated by the university president and in accordance with the changing needs of the university.
- Plan, implement and evaluate presidential development events, programs, and recognition or award event logistics, including, but not limited to: date, time and location, communications, materials, content, programs/agendas, decoration, vendors, speakers, stewardship activities, technical needs, travel/transportation, catering, schedules, budgets 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.
- Work collaboratively with Donor Relations staff with the coordination of donor stewardship and recognition plans and strategies for select donors and volunteers.
- Build and maintain relationships with Green and Gold Giving Society members.
- Oversee event registration process to include, but not limited to: invitation outreach, communicate with guests during RSVP and registration process, RSVP tracking, recruit and train additional registration staff for larger events, and utilize event registration and seating software to accurately and efficiently monitor guest attendance.
- Oversee President’s Suite during donor-centric athletic events to include: create, print, and extend invitations; take RSVPs; distribute credentials; develop and order collateral; develop on-budget catering menus; partner with University Police on parking and security; recruit, train, and schedule student employees; build and distribute confidential event briefings; coordinate on-site venue/event/staff; and coordinate strategic event seating in collaboration with development officers.
- Oversee Retired Faculty and Staff Club quarterly events and annual June Jubilee recognition event.
- Evaluate, implement and oversee digital invitation strategy to expedite invitation and RSVP process.
- Steward the philanthropic Foundation Board, through quarterly dinner programming.
- Develop, coordinate and distribute confidential briefing packets to the president and key university leadership for each event outlining objectives and overview, attendees of note, talking points, and additional pertinent information for the success of overall event strategy and on-brand messaging in collaboration with the Donor Relations Development Writer and Stewardship Coordinator.
- Arrange and conduct personal tours for high-level campus guests as requested by the President or University Development leadership.
- Develop and implement event forms, workflow documentation, and update presidential events protocol and procedures.
- Assist in managing the University Development master calendar of events.

**Event Expenses**

- Monitor event budget and obtain estimates from vendors/catering for related events, elevating concerns and discrepancies accordingly.
- Inspect invoices, 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, Alcohol Beverage Commission licenses, and all other appropriate insurance and licensing requirements.

**Department Administration**

- Supervise student assistants.
- Improve donor database by sending biographical updates to Development Support Services.
- Prepare documents for final mailings, including creating mail merges, obtaining signatures, etc.
- Organize and maintain event files, supplies, equipment, and storage areas.
- Answer main phone line and all dedicated department email accounts.

**OTHER JOB FUNCTIONS**

- Performs other duties and special projects as assigned.
- Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.

**MINIMUM QUALIFICATIONS:**

**EDUCATION AND EXPERIENCE:** Equivalent to graduation from a four-year college or university. Five years of progressively responsible general administrative support or technical experience. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

**LICENSES, CERTIFICATES, DEGREES, CREDENTIALS:**

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

**REQUIRED QUALIFICATIONS (SKAs):**

- Demonstrated ability to plan and execute high-level events which require an extensive degree of protocol and decorum.
- Excellent communication skills; ability to effectively communicate information in a clear and understandable manner, both verbally and in writing. Strong writing and editing skills to quickly and accurately produce letters, invitations, spreadsheets, proposals, agendas and timelines.
- Ability to use negotiation and persuasion skills to achieve results and expedite projects.
- Ability to interpret and apply policies and procedures independently, and use judgment and discretion to act when precedents do not exist.
- Ability to troubleshoot most office administration problems and respond to all inquiries and requests related to work area.
• Ability to understand problems from a broad perspective and anticipate the impact of office administration problems and solutions on other areas.
• Ability to analyze operational and procedural problems and develop, recommend, and evaluate proposed solutions.
• Thorough mastery of English grammar, spelling and punctuation.
• Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
• Ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
• Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
• Ability to interpret, communicate and apply policies and procedures, and use judgment and discretion to act when precedents do not exist.
• Ability to effectively handle interpersonal interactions at all levels and handle highly sensitive interpersonal situations.
• Demonstrated ability to maintain a high degree of confidentiality.
• Ability to apply general practices, methods and procedures related to public affairs, media relations, marketing, special events, and/or fundraising fundamentals. Ability to understand media outlets and proper uses.
• Ability to compile, write and present reports. Demonstrated ability to provide meticulous follow through for all assignments.
• Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.
• Ability to reason logically; analyze and solve problems; complete projects with little supervision; and meet strict deadlines.
• Ability to perform business math, analyze budgetary data, and make accurate projections requiring some inference.
• Ability to recommend creative solutions while ensuring compliance with established University policies and procedures.
• Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
• Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.

PREFERRED QUALIFICATIONS:
• Bachelor’s degree.
• Experience in the Microsoft Office Suite and Adobe Design Suite for producing brochures, invitations, handouts, programs, etc.
• Demonstrated experience in the successful planning and execution of high level events which require an extensive degree of protocol and decorum.
• Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

SPECIAL CONDITIONS:
• Must be willing to travel to coordinate off-site events and for occasional professional development.
• Must be able to transport and carry items up to 20 lbs. as needed and make frequent trips around campus and local community for job related assignments.
• Must be able to drive a vehicle for assignments on a regular basis.
• 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.
• 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 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).