

Give. Volunteer. Act.



Changing Lives Locally



United Way
Kingston, Frontenac,
Lennox and Addington

Director, Individual Giving
Position Brief



United Way
Kingston, Frontenac,
Lennox and Addington

TABLE OF CONTENTS

The Opportunity	2
About United Way Kingston, Frontenac, Lennox and Addington	2
Our Values	3
Additional Information	4
The Ideal Candidate.....	4
Key Responsibilities	5
Qualifications and Competencies.....	5
Application Process.....	6
Living in the Kingston Region.....	7
Organizational Chart	8
Biography of the President and CEO, Bhavana Varma	9

For more information, please contact:

Sylvie Battisti
Senior Executive Search Consultant
KCI (Ketchum Canada) Inc.
UWKFLA@kciphilanthropy.com
(438) 820-3496

Please note deadline for candidate submissions is November 30, 2018.

Director, Individual Giving

THE OPPORTUNITY

The United Way Kingston, Frontenac, Lennox and Addington is seeking a **Director, Individual Giving** to lead the development and implementation of a year-round fundraising, cultivation, and stewardship strategy to grow revenue through community gifts, leadership and major gifts, and planned endowment gifts.

Working closely with the CEO, as well as the Director, Workplace Giving and key volunteers, the Director, Individual Giving will create and execute strategies to grow relationships with individuals through affinity groups, in the community and in workplaces.

This is a newly adapted position at United Way KFLA, reporting to the CEO.

ABOUT UNITED WAY KINGSTON, FRONTENAC, LENNOX AND ADDINGTON

Since 1941, United Way KFLA has worked to build and strengthen our community by bringing people and resources together to facilitate change. We see a future where people are self-sufficient in a community where individuals live with hope, dignity, and a sense of belonging.

United Way KFLA works to strengthen lives by bringing together business, labour, individuals, government, and funders – to raise funds in support of a network of social service and health agencies. Seventy-seven years ago, our first campaign raised \$23,500. Today, the United Way of Kingston, Frontenac, Lennox & Addington raises \$3.5 million annually and supports 73 programs delivered by 41 agencies. In 2017, these programs helped 58,000 people.

Additionally our United Way works with community stakeholders to address root causes of social issues and focuses on long term outcomes. Moving forward, we are focusing our work and investments in three priority areas that are essential for our region to thrive:

1) **Helping Kids Be All They Can Be**

Our goal is to ensure children and youth are valued and supported, with opportunities and resources to help them reach their fullest potential.

We help by investing in:

- School food programs that let kids focus on learning – not hunger.
- Homework programs, one to one tutoring, stay-in-school incentives to engage kids in school.
- Intervention and mentoring programs to build self-esteem and overcome negative behaviours.
- Programs to support children and youth with mental health issues.

2) **Building Strong and Healthy Communities**

Our goal is to help people access programs that overcome barriers, build resilience, reduce isolation, and help them be part of a caring, inclusive community.

We help by investing in:

- Assistance for navigating complex support systems.
- Education and support to improve mental health and emotional wellbeing.
- Counseling to develop and maintain healthy relationships and connections.

3) Moving People from Poverty to Possibility

Our goal is to help people by reducing the impact of poverty and improving access to shelter and affordable housing.

We help by investing in:

- Housing stability for youth, with access to emergency shelter, transitional and safe, affordable housing, with support and resources to turn their lives around.
- Access to shelter and support for people to access permanent, safe, affordable housing.
- Food security for individuals and families to have with access to affordable, nutritious food.

Youth Out Loud is an example of a critical collaborative initiative that United Way of KFLA has worked on in developing and implementing an action plan to end youth homelessness in Kingston, Frontenac, Lennox & Addington. The plan was developed in close collaboration with youth and a steering committee, as part of a national pilot project, “Mobilizing Local Capacity to End Youth Homelessness in Canada.”

Of course, volunteer leadership is at the heart of all that we do:

- A volunteer **Board of Directors** governs all United Way decision-making. The Board oversees how donor money is distributed, shapes the strategic vision and plan, and monitors organizational performance.
- The **Campaign Cabinet** and **Leadership and Major Gifts Committee** are the driving force behind the annual campaign. These leaders encourage colleagues, peers, and their organizations to participate in our fundraising efforts. Gifts from Leaders of the Way (donors who give \$1,200+) are a critical part of our campaign. Leadership giving has increased annually over the last 10 years and has grown from \$696,000 in 2008 to \$1.4 million in 2017. This is a 104% increase over that time.
- Additionally there are volunteer committees for events and **affinity groups** including **Women United**, **Retirees United** and **Tech United**. Through Women United, our United Way KFLA has 325 female leaders who make a difference in our community by supporting local programs that have a significant impact.
- More than 2,500 volunteers across the region who share a common set of values and a common goal: to make a real and meaningful difference in our community.

In an effort to further build volunteer leadership capacity in our community; our United Way KFLA strengthens the voluntary sector by providing training and workshops to local volunteers and boards of directors as part of our volunteer **Leadership Development Services**. In addition, our **Volunteer Center** helps to assure volunteers a fulfilling volunteer experience and our **United Way Next Gen initiative!** focuses on developing a community of younger stakeholders. In recent years, United Way KFLA has worked closely with an Advisory Committee to design a Not for Profit Leadership Program, delivered through a partnership with St. Lawrence College. The first cohort of 15 leaders graduated in 2016.

OUR VALUES

- Operates with **integrity, transparency** and **accountability** to the **highest ethical standards** to ensure public trust.
- Provides **leadership** in driving social change, partnerships and collaborative innovation.
- **Respects community wisdom** by considering diverse viewpoints.
- **Harnesses and engages the talents and resources in our community** to enhance a philanthropic culture.
- **Promotes volunteerism** through creating awareness and engagement.

ADDITIONAL INFORMATION

- **Website:** <https://www.unitedwaykfla.ca/>
- **About Us:** <https://www.unitedwaykfla.ca/about-us/>
- **Our Programs:** <https://www.unitedwaykfla.ca/programs/>
- **Funded Agencies and Grantees:** <https://www.unitedwaykfla.ca/2017-Funded-Agencies.pdf>
- **Strategic Plan:** <https://www.unitedwaykfla.ca/2018/02/Strategic-Direction-Pillars.PDF.pdf>
- **Staff Team:** <https://www.unitedwaykfla.ca/about-us/united-way-team/>
- **Board:** <https://www.unitedwaykfla.ca/about-us/>
- **Leadership Giving Committee:** <https://www.unitedwaykfla.ca/about-us/>
- **Campaign Cabinet:** <https://www.unitedwaykfla.ca/about-us/>
- **Retiree Task Force:** <https://www.unitedwaykfla.ca/about-us/>
- **Financial Statements:** <https://www.unitedwaykfla.ca/financial-statements/>
- **Annual Report:** <https://www.unitedwaykfla.ca/about-us/>

THE IDEAL CANDIDATE

The Director, Individual Giving will possess a broad base of fundraising experience, including a solid understanding of individual giving at all levels, as well as knowledge of planned giving and annual campaigns. With an eye to growth, and building on our progress and success to date, the ideal candidate will aspire to take our fundraising programs and results to new levels of accomplishment.

A big picture thinker with a strategic mindset and a genuine passion for community, the new incumbent will have the proven ability to translate our programs, impact, and vision into compelling donor conversations at both the community level and with high-end donors. Confident, agile and creative, the successful candidate will be adaptable and flexible, thriving in a variety of stakeholder environments with a broad constituency of donors, business, labour and government leaders, social services agencies, foundations, youth, established and emerging diverse communities.

An exceptional relationship-builder by nature, the Director will possess strong emotional intelligence, and will manage up, across and down with poise and trustworthiness. The ideal candidate will be a collaborative and accessible leader and team player, with demonstrated success in effectively coaching, guiding, motivating and managing both staff and volunteers in a fast-paced environment. The new incumbent will be a particularly skilled enabler of volunteers, and will meaningfully engage and leverage senior volunteers and senior management to maximize their passion, time, and connections most effectively. The successful candidate will be comfortable reporting to the CEO but also taking direction from senior volunteer leaders and committees.

The Director, Individual Giving will be a results-driven individual with high energy, enthusiasm, and with a demonstrated ability to work effectively under pressure, as well as the ability and willingness to be hands-on and get the work done.

The successful candidate will be a strong communicator who represents the United Way thoughtfully, intelligently, and professionally, with a high degree of diplomacy, accountability, and unquestioned ethics. Respectful of others and appreciative of the value they bring to the table, the ideal candidate will be an excellent listener who seeks out different perspectives as a means to finding better solutions. The Director will embody the vision and mission of United Way and become an ambassador of the organization and its priorities, committed to its values, and to creating opportunities for a better life for everyone in our region.

KEY RESPONSIBILITIES

The Director, Individual Giving will focus on the following key responsibilities:

Fundraising Strategy and Leadership

- Maintain and grow Leadership donations (\$1200+), working closely with volunteers, CEO, and staff on building relationships.
- In collaboration with the CEO and volunteers, develop and implement targeted plans for strategic solicitation of workplace and non-workplace donors giving leadership gift-level donations.
- Develop communication and stewardship plans for donors, coordinate and manage stewardship events, working closely with Resource Development staff.
- Create a world class donor experience, ensuring the development of long term relationships between the donor and the United Way.
- Create and design a program and communication strategies that will maintain existing individual and corporate donors and grow donations through direct mail.
- Manage strategic relationships with select corporate and foundation partners to identify opportunities; solicit, steward and support applications for grants, foundation and corporate gifts.
- Support opportunities to grow relationships including, but not limited to, Women United, Retirees, Tech United.
- Coordinating agency tours, events related to affinity groups.
- Develop and implement planned giving strategy, managing activities, targets and timelines.
- Research, identify, cultivate and solicit Planned Giving prospects while managing and prioritizing relationships with current Planned Giving Legacy Society members.

Program Management

- Develop and execute plans in consultation with CEO and Leadership team.
- Monitor timelines and activities to ensure strategies and plans are being implemented successfully, providing regular reports and periodic updates.
- Supervision, coaching, and providing guidance to employees working on Individual Giving, development of annual work plans and identification of issues that may arise.

QUALIFICATIONS AND COMPETENCIES

- A proven and successful track record of related experience in fundraising, business development, sponsorship, sales and/or marketing. Experience in developing, implementing and managing plans, programs and projects.
- Demonstrated ability to identify and develop long-term donor relationships and clear evidence of ability to obtain support through intermediate, major gifts and planned gifts.
- Experience in team leadership and volunteer management will be considered assets.
- Experience in a fast paced complex setting driven by deadlines.
- Knowledge and/or experience with United Way movement will be considered an asset
- Demonstrated knowledge of MS Office Suite programs and CRM tools.
- Post-Secondary graduate from a recognized institution with degree/diploma preferably in Business Administration, Fundraising, Marketing or equivalent education and experience.
- CFRE designation or working towards this designation will be considered an asset.
- Possess a vehicle and valid driver's license and access to a vehicle.

Knowledge, Skills and Abilities:

- Superior interpersonal skills in working collaboratively with multiple stakeholders and building strong relationships internally and externally.
- Leadership style that excels in coaching, collaboration, providing direction and guidance.
- Analytical, comfortable with data and numbers.
- Critical thinking and strategic planning.
- Strong written, verbal, interpersonal and communication skills.
- Excellent organizational and time management skills.

- Maturity, judgment, and discretion in dealing with confidential, sensitive matters.
- Ability to manage numerous projects simultaneously, prioritize conflicting demands and work within tight deadlines.
- Ability to work independently and with supervision and in a flexible office environment.
- High level of integrity.
- Willingness to work flexible hours to meet deadlines.

APPLICATION PROCESS

KCI (Ketchum Canada Inc.) has been retained to conduct this search on behalf of the United Way Kingston, Frontenac, Lennox and Addington. For more information about this opportunity, interested candidates are invited to contact **Sylvie Battisti, Vice-President Executive Search** by email at UWKFLA@kciphilanthropy.com.

Resume and letter of interest are requested to be submitted to the email address listed above by *November 30, 2018*. All inquiries and applications will be held in strict confidence.

LIVING IN THE KINGSTON REGION

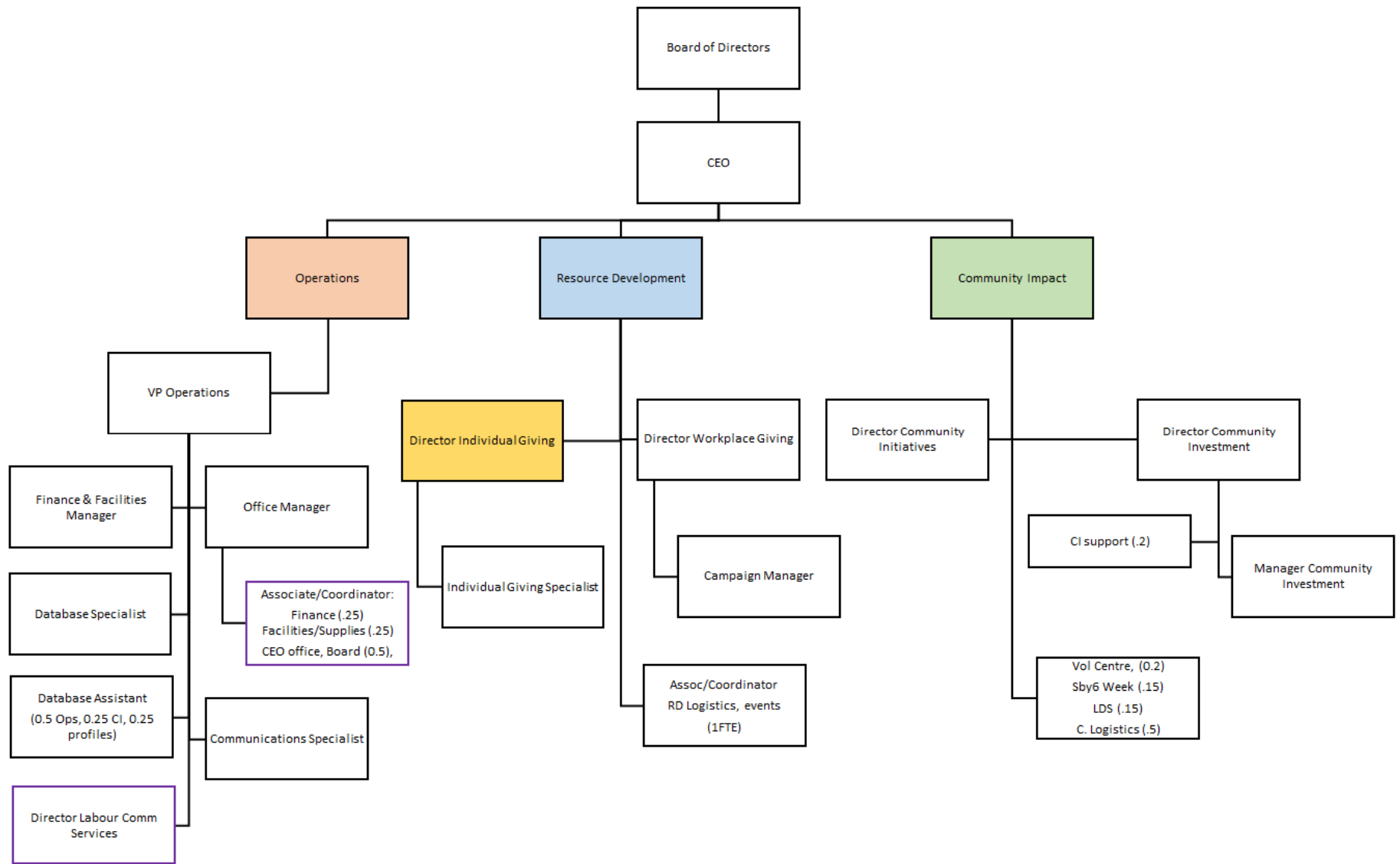
Nestled on the northeast shore of Lake Ontario, at the mouth of the St. Lawrence River, the historic city of Kingston and the neighbouring counties is a thriving region of 190,000 residents, boasting a superb quality of life due to its big-city amenities, affordability, waterfront location and rich natural landscape. As the gateway to the 1000 Islands and the UNESCO designated Rideau Canal, Kingston is a city rich in history, culture, critically acclaimed attractions and cuisine.

Located about 2.5-hours' drive from Toronto and Montreal, 2 hours from Ottawa, and 40 minutes from the U.S. border, Kingston is easily accessible by highway, air, train, and bus. Established as a fort in 1673, our city has a rich civic and architectural heritage, a safe and welcoming environment, and economic anchors of academia, government and industry. Kingston's industrial base consists of several thriving multinational companies and a strong core of small and medium sized businesses in a variety of sectors including manufacturing, mining, research and development.

More than anything, Kingston is a university town, home to 30,000 students studying at 3 post-secondary institutions, including Queen's. Within a 10-minute walk from campus, students can access all that our downtown core has to offer: shops, restaurants and cultural resources, waterfront pathways and the 19th century buildings and homes that signify Canada's "Limestone City". Kingston's civic pride in its gardens and green spaces has made it a frequent Communities-in-Bloom winner. In the annual ranking released by *MoneySense* magazine in 2015, Kingston maintained its dominance in accessible health care – placing in the top-25 percentile of the 209 cities ranked with 4.4 doctors per 1,000 people. Kingston also ranked in the top percentile with low taxes and easy commutes.

Cultural, recreation, and community activities abound in the Kingston region. Kingston has a symphony orchestra, many homegrown musical groups, amateur and professional theatre companies, performing and fine-arts schools and programs. In addition to a wide variety of organized sports and recreation programs, our region also offers easy access to nature for water sports and hiking. Close to the 1000 Islands, the region includes easy access to cottage country.

ORGANIZATIONAL CHART – UNITED WAY KFLA 2018/19



BIOGRAPHY OF THE PRESIDENT AND CEO, BHAVANA VARMA



Bhavana Varma has been with the United Way movement since 1990, when she and her husband moved to Canada from New Delhi, India. She started working with the United Way in 1991 with St. Catharines in a number of roles and the United Way in Kingston in 1999 as the CEO.

She works closely with a large team of volunteers and a staff team on resource development and community impact. In her time with this United Way, the annual campaign has grown from \$1.5 million in 1999 to \$3.5 million in 2017. Bhavana introduced Leadership and Major Gifts, which grew from \$124,000 in 1999 to \$1.4 million last year. Additionally, during this period, the United Way secured its largest individual gift – a \$1.2 million gift in 2015; and its largest bequest of \$1.5 million.

Working with community partners, Bhavana has introduced initiatives like *Success By 6 and 211* to the area and leads shared community plans for poverty reduction, youth homelessness and youth employment. She works closely with community partners, agencies, individuals with lived experience on collective impact initiatives to address the root causes of issues like youth homelessness and food access.

Her volunteer experience includes Distress Centre Niagara, Big Brothers & Sisters of Niagara, Trillium Grant Review Team in Niagara, and the Early Years Challenge Fund Committee in Kingston. Bhavana was founding co-chair of the Southeastern Association of Fundraising Professionals where she chaired their first AFP Philanthropy Day. She mentored students from St. Lawrence College and Queen's University and colleagues across the global United Way movement and volunteers to provide board governance workshops to not for profit agencies. She served on the Board of Directors of the Ban Righ Centre and is currently on the Board of Directors of the Kingston Symphony Association.

She is a member of the United Way of Canada Movement Advisory Council and on a number of committees and networks locally and with the United Way. With a Bachelors Degree as a base, and as part of ongoing learning, she has participated in a number of programs including the Executive Leadership Development Program with United Way Worldwide, Strategic Perspectives for Non-Profit Management at Harvard University, Change Management with the Rotman School of Business and Human Services Leadership with Brock University.

Bhavana has received local recognition including the Queen Elizabeth II Diamond Jubilee medal, Queen's University Alumni Association Jim Bennett Achievement Award and the Kingston Labour Council Community Activist of the Year. In her spare time she enjoys music, hiking, reading and travel.