

United Way of Kingston, Frontenac, Lennox and Addington
Job Description
Resource Development Officer (Individual Giving)

1. Job Identification

Job Title:	Resource Development Officer (IG)
Department:	Resource Development
Job Reports to:	Director Resource Development
Category:	Permanent, full-time
Classification:	Senior Manager
Creation Date:	October 2018
Revision Date:	December 2018

2. Job Overall Purpose

The RD Officer Individual Giving (RDO (IG)) oversees the development and implementation of a year-round fundraising, cultivation and stewardship strategy. The RD Officer (IG) recommends a strategic plan to grow revenue through direct mail, Leadership & Major Gifts and planned endowment gifts.

This position works closely with the CEO, Director Resource Development, and key volunteers to identify and develop strategies to grow relationships with individuals in the community and in workplaces.

3. Job Responsibilities

Responsibilities	%
<p>Direct Mail</p> <ul style="list-style-type: none"> • Maintain existing individual and corporate direct mail donors and grow donations, identifying opportunities for a personalized approach • Working closely with Workplace Giving team, manage strategic relationships with select corporate and foundation partners to identify opportunities; solicit, steward and support applications for grants, foundation and corporate gifts 	15%
<p>Leadership Giving</p> <ul style="list-style-type: none"> • Maintain and grow Leadership donations (\$1200+), working closely with volunteers, CEO, DRD and staff on building relationships • Working with CEO, DRD and volunteers, develop and implement targeted plans for strategic solicitation of workplace and non-workplace donors giving large donations <p>Recognition and Stewardship</p> <ul style="list-style-type: none"> • Manage communication and stewardship plans for donors, including Leadership and other stewardship events 	40%

<p>Donor experience and relationships</p> <ul style="list-style-type: none"> • Implement plans for a world class donor experience, ensuring the development of long term relationships between the donor and the United Way 	
<p>Planned Giving</p> <ul style="list-style-type: none"> • Implement planned giving strategy, managing targets and timelines, recommending ways to grow awareness of planned gifts • Research, identify, cultivate and solicit Planned Giving prospects while managing and prioritizing relationships with current Planned Giving Legacy Society members 	10%
<p>Planning, Reporting, Management</p> <ul style="list-style-type: none"> • Develop and execute plans in consultation with CEO, DRD and Leadership team • Monitor timelines and activities to ensure strategies and plans are being implemented successfully, providing regular reports and periodic updates 	15%
<p>Affinity Groups</p> <ul style="list-style-type: none"> • Support opportunities to grow relationships including, but not limited to, Women United, Retirees, Tech United • Coordinating agency tours, events related to affinity groups 	10%
<p>Other duties</p> <ul style="list-style-type: none"> • Other duties as may be assigned or may come up as part of organizational requirements 	10%

These statements reflect the general details considered necessary to describe the principal functions of the job as identified, and shall not be considered as a detailed description of all work requirements that may be inherent in the job. The employee may be asked to work on other duties as assigned from time to time.

4. Job Qualifications

<p>Education:</p> <ul style="list-style-type: none"> • 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 <p>Experience:</p> <ul style="list-style-type: none"> • Must have a minimum of three to five years' recent experience in fundraising • Specific planned giving and annual campaign experience is an asset • Experience in managing volunteers is an asset • Experience in developing and/or implementing fundraising plans • Experience developing long term relationships • Knowledge and/or experience with United Way movement is an asset <p>Knowledge, Skills and Abilities:</p> <ul style="list-style-type: none"> • Critical thinking • Maturity, judgement and discretion in dealing with confidential, sensitive matters • Skilled with analysis and interpretation of data and numbers • High level of integrity
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- Collaborative work style
- Demonstrated knowledge of MS Office Suite programs and CRM tools
- Strong written, verbal, interpersonal and communication skills
- Ability to work in a flexible office environment
- Excellent organizational and time management skills
- Ability to prioritize conflicting demands and work within tight deadlines
- Ability to multitask and manage numerous projects simultaneously
- Ability to take direction and to work independently
- Ability to work in a team environment
- Willingness to work flexible hours, including evenings and weekends
- Must possess a valid drivers' license and access to a vehicle

5. Core Competencies

These individual competencies represent the knowledge, abilities and behaviours that result in an individual's personal effectiveness and effective interactions with others. These were created by United Worldwide to provide local United Ways with the blueprint of competencies that individual candidates and staff members should possess to be recruited, developed and retained as United Way employees. While it is not a requirement to be an expert in all of these areas, it is expected that you have the ability to grow your knowledge in each of the areas and demonstrate the behaviours on a consistent basis.

Competency	Attributes & Behaviours
Mission-focused	Ability to link donor, volunteer, and advocates' aspiration to needs; Ability to catalyze others' commitment to mission; Strives vigorously to accomplish shared goals; Separates one's own interests from organizational interests in order to make the best possible judgments for the organization
Relationship-oriented	Understands what motivates individuals and organizations; Values diversity and inclusion; Effectively communicates; Treats others with respect and RDO (IG)nity; Actively listens to and facilitates diverse input and contributions
Collaborator	Seeks and shares knowledge of community; Takes collaborative approach to addressing issues; Focuses on shared goals; Mobilizes a broad range of sectors and resources
Results-driven	Has a searing focus on results and can effectively communicate goals and impact; Advocates for support of education, income, and health; Promotes innovation / willing to take risks; Develops relationships to drive resources and results; Has the necessary organizational skills to deliver on business model
Brand-steward	Acts with integrity and strong ethics to foster trust at all levels (personal, market,

	societal); Internalizes the meaning and commitment of United Way and consistently acts according to its value and purpose; Demonstrates the values of the network; is a good system-citizen; Is accountable and transparent with all stakeholders
Drives Revenue & Impact	Effective Fundraiser; Connects with People; Ambitious and Relentless; Interpersonal Communicator; Persuasion and Influence
Strategic Relationship Building	Creates Win/Win Relationships; Maximizes Lifetime Donor Value; Prospect Management; Effective Selling; Cultural Awareness; Networking
Effective & Engaging Communicator	Story Teller; Skilled Communicator; Strategic Communicator; Connects with Audience; Internal Collaborator
Embracing & Managing Change	Constructive Optimism; Manages Change; Demonstrates Resilience; Demonstrates Flexibility; Manages Ambiguity
Entrepreneurial & Innovative	Business Acumen; Risk Taking (calculated); Steward Donors; Takes Initiative; Effective Persuasion

6. Working Relationships

Most Frequent Contacts	Nature or Purpose of Contacts
CEO, DRD	Report, recommend, receiving coaching
Donors	Solicitation, relationship building, stewardship
Volunteers	Advice, guidance, communication
Other United Ways	Best practices, shared approaches

7. Decision-Making Authority

- Setting priorities and balancing workload
- Providing information, guidance, coaching to volunteers and staff
- Participating in campaign planning
- Recommendations of plans re: Major Donors and Planned Giving
- Recommending stewardship, relationship building strategies for donors and prospects

8. Other Information

The United Way works with community volunteers and is volunteer led. The role of the staff team, individually and collectively, is to support and manage volunteers, building long term relationships with partners, volunteers, donors and workplaces. We are a small, flexible employee group that works in a team environment, with employees pitching in as required, based on the needs of the organization and with an agility that is inherent in the work we do.

We value exceptional customer service, teamwork, drive and initiative. Our staff are solution-focused, accountable and take responsibility for the key areas of focus, and are comfortable with change, recognizing that change is a constant in this environment.

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Classification:	Senior Manager
Number of Incumbents:	1
Number of FTEs:	1.0

9. Working Conditions

A. Physical Effort

<input checked="" type="checkbox"/>	Much of the time is spent in a comfortable position with frequent opportunity to move about. Infrequent need to move or lift articles.
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B. Physical Environment

<input checked="" type="checkbox"/>	Regular exposure to factors causing moderate discomfort. Slight possibility of accident or illness.
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C. Sensory Attention

<input checked="" type="checkbox"/>	Frequent need to give close attention, with one or two senses at a time, to what is happening.
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D. Mental Stress

<input checked="" type="checkbox"/>	Work and environment change very little over time. Pronounced pressure from deadlines, production quotas, accuracy or similar demands. Unpleasant social contacts and/or concern about unpleasant situations are probable.
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Examples of tasks related to job description: these are some tasks related to the position; other processes and tasks may be added as the position and processes evolve

Develop and implement annual planned giving plans

- Managing targets and timelines, towards the planning and implementation of a full planned giving program in the future
- Research, identify, cultivate and solicit Planned Giving prospects while managing and prioritizing the current Planned Giving Legacy Society members

Assist with creating reports, events, donor correspondence for donors of high net worth with the potential to give at a significant level

- Identify, research and vet prospects/donors
- Regular review of prospect list to identify high net worth individuals with capacity, affiliation and affinity
- Develop profile, and recommend strategy based on areas of interest; peer review and research
- Recommend cultivation and relationship building strategy
- Implement strategies to secure gift, including appropriate involvement of CEO, board, volunteers.

Working with CEO and volunteer committee, develop and implement plans for strategic solicitation of workplace and non-workplace donors giving \$1200 and higher

- Maintain and grow donors giving larger gifts
- Maintain and update profiles and contact reports
- Keep Andar (CRM) up to date with contact information and pertinent details
- Mailings (invites, email blasts)
- Enhanced Leadership / Planned Giving
- Develop letters and customized packages for solicitation and stewardship

Growing and Migrating Leadership Gifts

- Maintain donors who give \$1,200+
- Identify opportunities for increased giving from existing donors

Leadership Prospecting

- Identify and recommend prospective donors with capacity to give at Leadership or Major Gift levels
- Work with CEO to confirm list of prospects, segmenting by potential, existing relationships and history with United Way
- Working with and supporting volunteer committee to coordinate meetings, assist with information as required
- To support and/or to solicit and engage individuals who may not be giving or not giving at the Leadership level, including local business owners and individuals who are not involved with workplace campaigns or within workplace campaigns

Planning and Reporting

- Develop and execute plans in consultation with CEO, DRD, volunteer committee, providing milestones, updates and red flags periodically
- Annual review and update of Donor Relationship Management model (DRM)
- Communicate and oversee implementation of DRM across departments and functions
- Mine data, Identify, research new or existing prospects and provide recommendations for plans for individual donors to CEO
- Monitor timelines and activities to ensure strategies and plans are being implemented successfully, providing regular reports and periodic updates to CEO

Community and Corporate Giving, Foundations and Grants

- Build strong direct mail and community giving program both, individual and corporate
- Identify opportunities in local businesses and corporations
- Manage and provide direction to coordinate research, communication, solicitation and stewardship processes to move identified direct mail donors and prospects to Leadership, major gifts and potentially planned gifts
- Provide direction to identify opportunities and solicit, steward and support applications for grants, foundation or corporate gifts.

Recognition and Stewardship Tracking

- Ensure accuracy of information
- Document key conversations and other pertinent donor information in donor management database

- Develop and maintain accurate donor information for all major donors, prospects and specific donors
- Follow-up to secure financial commitments, pledges where required, while maintaining and growing donor relationship
- Work with finance and RD departments, track and manage gifts, identifying opportunities to develop and enhance relationships
- Support staff and volunteers to ensure processes and implementation for tracking, monitoring, follow up and thanking Major donors and identified Leaders

Communication

- Assist and provide input in the design of Leadership & Planned Giving promotional materials (i.e. website, newsletter, newspaper ads, directories, social media, letters, and brochures)
- Work on annual stewardship packages and, where required, customize packages
- Develop customized communication and stewardship plans for major donors, especially when linked with specific products or programs

Donor Experience and Relationships:

- Create a world class donor experience
- Work with the CEO and CI team to identify projects and opportunities to engage donors to cultivate and build relationships
- Facilitate conversations between donors and CEO where optimally required
- Ensure the development of long term relationships between the donor and the United Way
- Engage donors and prospects through events and activities designed to cultivate Leadership donors and enhance relationship to United Way
- Make visits and/or strategically coordinate visits to prospective donors and existing donors
- Maintain and enhance relationships with key volunteers i.e. Leadership and Major Gift committee volunteers

Leadership Stewardship Events

- Plan and oversee Leadership stewardship events as part of a strategy to maintain and grow Leaders and elevate Leadership donors into Major Donors
- Support opportunities to grow relationships including, but not limited to, affinity groups and stewardship events

Other duties as may be assigned or may come up as part of organizational requirements