

## **Job Description** **Director, Resource Development**

### **1. Job Identification**

Job Title:	Director, Resource Development
Department:	Resource Development Department
Job Reports to: (title)	President & CEO
Category	Permanent, Full-time
Creation Date:	October 2018
Revision Date:	December 2018

### **2. Job Overall Purpose**

Reporting to the President & CEO, the Director, Resource Development (DRD) will work with volunteers and staff to develop, evaluate and implement a year-round fundraising strategy that builds strong relationships with donors and workplaces.

Reporting to the CEO, the Director Resource Development provides leadership, recommends and executes a strategic fundraising plan to grow giving through a number of fundraising channels – workplace campaigns, direct mail, Leadership gifts, Major gifts, Transformational gifts, and planned giving.

The DRD will oversee a team of fundraising staff that support workplace campaigns, and will also focus on enhancing the existing Leadership and Major Giving program and a planned giving program, implementing plans for engagement and relationship building.

The DRD will provide the CEO with all relevant information and updates in a timely manner, troubleshooting and intervening where required to ensure all tasks and timelines are met. The DRD is responsible for developing, monitoring and addressing issues related to the critical path, work plans and all deliverables related to the areas of responsibility.

As a member of the leadership team, this individual will participate in strategic initiatives, planning and development of strategies and tactics for the United Way KFLA.

### 3. Job Responsibilities

Responsibilities	%
<p><b>Management of Department</b></p> <ul style="list-style-type: none"> <li>• Develop annual work plans and critical path for the RD department, with strategic counsel from CEO and Leadership Team</li> <li>• Provide regular updates, identifying red flags, challenges and opportunities</li> <li>• Provide leadership, guidance and support to RD staff, working with them to address challenges, meet deadlines and ensure goals, objectives and timelines are met.</li> <li>• Coach and manage staff, implementing United Way Talent Management Strategy, including evaluation of performance of direct reports, personal and professional development, mid-year and annual performance reviews</li> <li>• Regularly review and develop processes, procedures to optimize opportunities</li> </ul>	10%
<p><b>Annual Workplace Campaigns</b> The DRD will</p> <ul style="list-style-type: none"> <li>• Oversee the annual workplace campaign, directly managing specific workplaces</li> <li>• Support the Campaign Cabinet, providing regular updates and reports</li> <li>• Oversee engagement and fundraising events</li> <li>• Develop campaign, sector, account plans, based on data and analysis</li> <li>• Provide regular updates to the CEO, keeping them informed and updated on all workplace campaign activities, accomplishments, challenges and opportunities</li> </ul>	30%
<p><b>Sponsorship</b></p> <ul style="list-style-type: none"> <li>• Oversee the development and implementation of sponsorship</li> <li>• Recruit Sponsored Employees and oversee program</li> </ul> <p><b>Business Development and Prospecting</b></p> <ul style="list-style-type: none"> <li>• Develop and oversee implementation of plan for business development, supporting staff and committee</li> </ul>	10%
<p><b>Communication and Promotion</b></p> <ul style="list-style-type: none"> <li>• Coordinate communications plans related to the campaign</li> <li>• Oversee the development of promotional materials for campaign, sponsorship, initiatives and events, ensuring timely development, production and distribution</li> </ul>	10%
<p><b>Individual Giving</b></p> <ul style="list-style-type: none"> <li>• Ensure direct mail is timely, accurate and maximizes potential</li> <li>• Work closely with volunteers, CEO and staff on the implementation of strategies to grow Leadership Giving</li> </ul>	30%

<ul style="list-style-type: none"> <li>• Provide direction and guidance for stewardship and relationship management plans</li> <li>• Develop and implement a planned giving program, working closely with staff and volunteers</li> <li>• Support affinity groups</li> </ul>	
<ul style="list-style-type: none"> <li>• Other duties as may be assigned or may come up as part of organizational requirements</li> </ul>	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.

#### 4. **Job Qualifications**

<p><b>Education:</b></p> <ul style="list-style-type: none"> <li>• Diploma from a recognized college or equivalent education and experience</li> <li>• Degree from a recognized university is preferred</li> </ul> <p><b>Experience:</b></p> <ul style="list-style-type: none"> <li>• Five years' recent experience at a management level in fundraising or customer service/sales</li> <li>• Experience and skills in building long term relationships</li> <li>• Experience in managing employees and volunteers is essential.</li> <li>• Experience in developing, implementing and managing plans, projects and reports</li> <li>• Knowledge and/or experience with United Way movement</li> <li>• Experience developing long term professional and business relationships</li> </ul> <p><b>Knowledge, Skills and Abilities:</b></p> <ul style="list-style-type: none"> <li>• Critical thinking ability</li> <li>• Maturity, judgement and discretion in dealing with confidential, sensitive matters</li> <li>• Demonstrated leadership skills and management experience</li> <li>• Excellent customer service skills</li> <li>• Skilled with analysis and interpretation of data and numbers</li> <li>• High level of integrity</li> <li>• Collaborative work style</li> <li>• Demonstrated knowledge of MS Office Suite programs and CRM tools</li> <li>• Strong written, verbal, interpersonal and communication skills</li> <li>• Ability to work in a flexible, fast-paced office environment</li> <li>• Excellent organizational and time management skills</li> <li>• Ability to prioritize conflicting demands and work within tight deadlines</li> <li>• Ability to multitask and manage numerous projects simultaneously</li> <li>• Ability to take direction and to work independently</li> <li>• Ability to work in a team environment</li> <li>• Leadership style that excels in coaching, collaborating, providing direction and guidance</li> <li>• Willingness to work flexible hours, including evenings and weekends</li> <li>• Must possess a valid driver's license and access to a vehicle</li> </ul>
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## 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 dignity; 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	Recommend, get approvals
Leadership team	Advise, recommend, communicate
RD staff	coach, manage, performance review
United Way staff	communicating
Cabinet	Reporting, update, support
Volunteer groups	Reporting, monitoring, coaching
Other United Ways	communicate
Vendors	Purchasing

## 7. Decision-Making Authority

<ul style="list-style-type: none"> <li>• Strategic decisions and recommendations related to fundraising</li> <li>• Financial: monitor campaign revenue and pledge collection, managing budget for events, campaign materials and supplies</li> <li>• Human resources: recommending hiring and development, performance management of campaign staff and sponsored employees</li> <li>• Information technology operation decisions: input into IT solutions, ePledge platforms, to support campaign</li> <li>• Purchasing: development and purchasing of campaign material</li> <li>• Marketing &amp; Communications: Provide input into development of marketing and training materials, communications tools</li> </ul>
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## 8. Other Information

<p>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.</p> <p>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.</p>
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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.

**For Human Resources Use Only**

Classification:	Director, Department Head
Number of Incumbents:	1

**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

**Annual Campaign:**

Work closely with CEO, RD staff, Cabinet, committees and volunteers to

- Provide oversight and guidance to workplace campaign staff as they implement strategies to increase revenue through events, workplace giving, business development, leadership giving and major gifts
- Manage specific workplace campaigns, business development opportunities
- Provide regular updates and reports to CEO on progress, seeking direction as appropriate
- Segment workplaces, with relationship building structure, strategies and objectives for workplace campaign growth
- Ensure Campaign Analysis and Planning (CAPS), Mid-Campaign Analysis (MIDS) occur

- Regularly analyze data to recommend new or enhanced strategies to increase donor recruitment, retention, engagement and growth
- Increase efficiency and ease of giving through utilization of digital products like ePledge, online giving, holiday giving that attract new donors and/or increase donor engagement
- Work with staff to develop annual campaign, sector and account plans based on environmental scan, data analysis and existing strengths
- Work with staff on volunteer training, peer best practices, engagement and awareness opportunities, growing campaign and donor engagement and loyalty
- Ensure accuracy and timely production and distribution of direct mail
- Support campaign cabinet, providing regular reports and information
- Provide leadership and direction for sponsorship and events

**Affinity Groups and engagement**

- Work on plans to engage affinity groups and diverse demographics i.e. Women in Leadership, Next Gen, Retirees
- Provide guidance and oversight of engagement events (like Days of Caring, tours, kickoff, touchdown), ensuring deadlines are met, adequate sponsorships and resources are available, recommending changes where needed to streamline and enhance events
- Liaise with Communications Specialist to ensure timely implementation and coordination of communications plans
- Support and ensure timely and regular distribution of newsletters

**Leadership Giving:**

- Develop plans and coordinate ask for challenge grant
- Develop and implement approved annual Leadership Giving fundraising goals, managing targets and timelines-
- Maintain the current base of Leaders and Major Donors by identifying strategic touch points and engagement, utilizing CEO and volunteer team, to keep donors invested in United Way
- Develop strategy to move Leadership donors, where possible, into Major Donors
- Work closely with the campaign relationship managers to develop and execute plans to steward and grow Leadership Giving in workplaces

**Major Gifts:**

- Maintain and grow donors giving \$5,000 as per relationship management and volunteer management model
- Develop customized products and stewardship packages for major donors

**Prospecting:**

- Identify opportunities for increased giving
- Working with CEO and volunteer committee, solicit and engage local business owners who are not running workplace campaigns and other individuals who may not be giving or not giving at the Leadership level

**Planned Giving:**

- Develop planned giving strategy including goals, managing targets and timelines; recommend to CEO
- Oversee implementation of plan

**Planning and Reporting**

- Develop, recommend plans and strategies, implement plans to maximize individual giving potential for identified donors
- Mine data, Identify, research new or existing prospects and provide profiles, recommendations and plans to CEO
- Execute plans, providing milestones, updates and red flags periodically
- Monitor budget and inventory, revising processes to maximize efficiency and cost effectiveness

**Community and Corporate Giving, Foundations and Grants**

- Make recommendations, working with RD staff to build strong direct mail and community giving program
- Identify opportunities in local businesses and corporations
- Manage and coordinate research, communication, solicitation and stewardship processes to move identified direct mail donors and prospects to Leadership, major gifts and planned gifts
- Identify opportunities and solicit, steward and support applications for grants, foundation or corporate gifts.

**Recognition and Stewardship**

- Create a world class donor experience, working with the CEO and CI team to identify projects and opportunities to engage donors in roles to support United Way and further cultivate relationship building and giving
- Oversee the implementation of s strategic stewardship plan
- Engage donors and prospects through events and activities designed to cultivate Leadership donors and enhance relationship to United Way
- Ensure the development of long term relationships between the donor and the United Way