

United Way Kingston, Frontenac, Lennox & Addington
JOB DESCRIPTION

Job Title:	Donor Relations Officer		
Reporting to:	Senior Director, Development		
Job Classification	Level 3: Officer, Specialist		
Department:	Resource Development		
Creation Date:	April 2020	Revision Date:	September 2021

SUMMARY

The Donor Relations Officer (DRO) ensures a world class donor experience for all donors, implementing and developing plans so they are appropriately recognized, thanked and stewarded.

Working closely with the CEO and SDD this position creates and executes strategies to cultivate, maintain and grow relationships with individuals through customized and general stewardship plans for donors in the community and in workplaces.

Reporting to the Senior Director, Development (SDD), the DRO supports Leaders of the Way (LOTW) & Major Individual Gifts (MIG) committees and CEO. They develop and implement stewardship plans and donor relationship models, managing all processes related to stewardship.

The DRO supports the process of securing targeted gifts that fit with United Way's strategic direction and investment strategy through individual, corporate and foundation giving.

DUTIES & RESPONSIBILITIES

Stewardship and Leadership giving (40%)

- Ensures all donors have an excellent donor experience and that they are appropriately recognized, thanked, and stewarded
- Ensures the cultivation, development and maintenance of long-term relationships between the donor and UW KFLA
- Develops customized communication and stewardship plans for donors
- Supports Leadership & MIG committees, SDD and CEO to facilitate relationship building and stewardship
- Manages and coordinates stewardship events, provides attendee lists and support at events to CEO, SDD and volunteers to ensure Leaders and MIG are provided appropriate support and recognition
- Works closely with CEO, SDD, volunteers and staff on building relationships to maintain and grow Leadership donations (\$1200+) and major donors (\$5,000+)

- Works with staff in campaign on Leadership giving in workplaces, working with account managers to secure and steward Leaders of the Way in workplaces
- Works closely with CEO to implement stewardship plans to engage individuals through targeted affinity groups

Individual, Grants, Foundation and Corporate Giving (25%)

- Ensures direct mail is timely, accurate and maximizes potential, growing donations through this channel
- Solicits, stewards and supports applications for grants, foundation and corporate gifts, managing strategic relationships with select corporation and foundation partners
- Reviews Corporate Social Responsibility goals for key accounts and develops customized stewardship and reporting for them, working closely with account managers
- Implements stewardship and relationship management plans to be implemented for foundations, business and community mail donors
- Works closely with Community Impact department and Resource Development department to develop solicitation, communications and stewardship plans for prospects
- Develops annual work plans and identifies and troubleshoots issues that may arise in meeting goals and timelines

Data, Research and Analysis (15%)

- Reviews and updates Donor Relationship model and stewardship strategies to reflect fundraising trends and best practices
- Researches, supports and coordinates LOTW and MIG plans, and maintains strategic plans for key donors
- Works closely with database team to maintain accurate data, analysis and recording of information on prospects and donors
- Researches, collects information, and customizes profiles and reports for the timely solicitation and stewardship of donors
- Prepares research and background reports, sharing results with CEO, SDD and strategic volunteer relationship partners

Planned Giving (10%)

- Communicates and engages with loyal donors, raising awareness about the option of planned gifts
- Develops plans to steward donors who have indicated future endowment fund gifts through bequests
- Maintains records of donors who have left bequests to the United Way
- Researches, identifies, cultivates and solicits Planned Giving prospects

Other Duties (10%)

- Other duties or tasks may be assigned based on the business needs of the organization

EDUCATION AND EXPERIENCE

Education:

- Diploma or Degree from a recognized post-secondary institution, preferably in Business Administration, Fundraising, Marketing or equivalent education and experience
- Certified Fund Raising Executive (CFRE) or working towards designation

Experience:

- Minimum of three years' experience with proven success in fundraising, business development, sponsorship, sales or marketing working with diverse populations

Skills & Abilities:

- Possesses a positive, collaborative attitude with strong relationship-building skills
- Sound computer skills including spreadsheets, word processing, email / internet, database and / or fundraising software
- Very well-developed analytical and reasoning skills
- Ability to mobilize others, including volunteers and stakeholders to deliver and implement strategies, tactics and action plans
- Ability to use formulae, tables and graphs
- Strong written, verbal, interpersonal and communication skills
- Proven time management skills and ability to effectively organize work in an environment with competing work duties
- Ability to work in a fast-paced, complex and flexible office environment
- Maturity, judgment, and discretion in dealing with confidential, sensitive matters
- A committed team player who is also able to work in a self-directed manner
- Non-traditional hours are required due to deadlines
- Access to adequate transportation is essential

COMPLEXITY OF DECISIONS

Typical decisions include priority setting and managing workload, developing, monitoring and reporting on project plans and related initiatives.

Judgement is required for setting priorities for Individual Giving initiatives and ensuring their implementation. Support and guidance for decision making is available as needed.

MANAGEMENT / SUPERVISORY AND ADVISORY RESPONSIBILITY

Direct Supervision:

- There is no direct report for this position.

Indirect Supervision:

- There are no indirect reports for this position.

TYPE OF SUPERVISION REQUIRED / INDEPENDENCE OF ACTION

The Director, Donor Relations operates under a moderate independence of action with the availability of general direction provided by the Senior Director Development

Policies and general objectives are available, however there is a requirement to show independent thinking and creativity to address tasks and work.

CONSEQUENCE OF ERROR

Typical errors may result in strained relationships with donors, events or initiatives that are not planned and coordinated effectively, etc. These errors are most often detected before they are implemented and most often result in lost time.

More serious errors could result in adverse impacts on the UW KFLA's image and reputation.

CONFIDENTIALITY

This role is privy to some confidential information related to activities of the organization and impacts within the community. Disclosure could have a moderate impact externally.

CONTACTS

Internal:

- Management team, Staff
- Nature of the Contact – recommendations, approvals, collaboration, supporting initiatives

External:

- Donors, Volunteers, Committees
- Nature of the Contact – relationship building liaison, information sharing, communications, negotiations, enquiries, etc.

PHYSICAL EFFORT

- Majority of time is spent in a comfortable position with frequent opportunity to move about
- Infrequent need to move or lift articles

PHYSICAL SKILLS

- Regular need to give close attention, hearing or seeing, to what is happening
- Requirement to work at a computer, keyboarding, etc. and various events, meetings, etc.

WORKING CONDITIONS

Physical:

- Located in a comfortable indoor area
- Regular exposure to factors causing moderate discomfort
- Slight possibility of accident or illness

Stress:

- 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

COMPETENCIES

The United Way Worldwide has developed an extensive Competency Model Framework. The Framework supports a common set of competencies to ensure that each United Way is able to attract, grow and retain the right people who have key competencies in areas that are fundamental to our mission and strategic direction.

Specific definitions, traits and behaviours are outlined the Framework titled: United Way Worldwide Competency Models. Those specific competencies that apply this this position are:

- Mission focused
- Relationship oriented
- Collaborator
- Results driven
- Brand steward
- Drives Revenue & Impact
- Strategic Relationship Building
- Effective & Engaging Communicator
- Embracing & Managing Change
- Entrepreneurial & Innovative