

United Way of Northeast Florida

Position Description

# Position Title: Director of Major and Legacy Gifts

**Department: Resource Development**

**Reports to: Head of Major Gifts and Legacy Giving**

**Reviewed: September 2018 FLSA Status: Exempt**

***Vision and Mission*:**

At United Way of Northeast Florida, we envision a community of opportunity where everyone has hope and can reach their full potential. Our mission is to solve our community’s toughest challenges by connecting people, resources and ideas**.**

## *Purpose of Position*:

The Director of Major and Legacy Gifts oversees the Planned Giving and Major Gifts programs at the United Way of Northeast Florida. Working directly with the Individual Engagement Staff, and members of the Resource Development Council and other volunteers, this position is responsible for developing and managing all activities related to the cultivation, solicitation and stewardship of our major and planned gift donors, ensuring these donors are inspired by United Way’s mission and engaged in supporting the organization.

The Director of Major and Planned Legacy Gifts manages their own portfolio of donors, and is responsible for prospect research, presentation materials, budgeting and all activities to cultivate, track and solicit all supporters of $50,000+ or more. The incumbent will work with the community impact and volunteer engagement departments, and finance staff to develop strategic and targeted giving opportunities for major donors in an effort to increase funding each year.

***Key Responsibilities and Essential Functions***:

**Fundraising:**

* Responsible for annual revenue goals for the major donor and planned giving programs.
* Directs efforts to identify, cultivate, solicit and steward potential major donors, and planned givers.
* Designs and coordinates targeted fundraising activities and events for prospective and current major donors, and for cultivation and recognition of current major donors and committed planned giving donors.
* Responsible for oversight of the United Way’s planned giving program, including: staffing of the Legacy Committee, promotion of planned giving opportunities, and solicitation and cultivation of prospective and current planned giving donors.

**Management:**

* Responsible for the success of growth and performance to reach quarterly and annual revenue goals, to ensure that the major and planned giving programs are highly efficient, effective, ethical and well leveraged
* Tracks and reports progress using specific metrics based from moves management system
* Works with the Vice President of Major Gifts on annual planning, budgeting and goal setting for major and planned gift related activities
* Assists in the recruitment of leadership volunteer solicitors and develops their fundraising capacities
* Adheres to moves management system in CRM and enters information in a timely matter

***Experience/Position Requirements*:**

* Proven experience cultivating, soliciting and stewarding donors resulting in $50,000 plus gifts
* Minimum of five years’ experience in nonprofit major gifts and planned giving fundraising, or with proven major gift experience, capacity to learn and implement a complex planned giving program
* Strong interpersonal written communication and presentation skills
* Proven experience with the development and implementation of administrative functions
* Ability to handle calmly and efficiently situations ranging from routine to highly complex
* Demonstrated ability to multi-task and work successfully in a fast-paced environment with a high degree of attention to detail and minimum supervision
* Ability to work independently as well as on a team

***Professional Core Competencies Required***:

* Mission Focused: Creates real social change that leads to better lives and healthier communities. This drives performance and professional motivations.
* Relationship Oriented: Places people before process and is astute in cultivating and managing relationships toward a common goal.
* Collaborator (Includes teamwork and communication): Understands the roles and contributions of all sectors of the community and can mobilize resources (financial & human) through meaningful engagement. Strong supporter of a team environment.
* Results Driven: Dedicates efforts to shared and measurable goals for the common good; creating, resourcing, scaling and leveraging strategies and innovations for broad investment and impact.
* Brand Steward: Understands role in growing and protecting the reputation and results of the greater network.
* Strategic Relationship Building: Develops and maintains strategic relationships that generate the resources necessary to support United Way’s mission.
* Change Management: Champions and facilitates change to ensure long-term community sustainability.
* Entrepreneurial and Innovative: Creatively seeks new opportunities to generate revenue and other resources that add greater value to the organization and the community.

***General Physical Requirements for Essential Functions of the Job:***

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job the employee is regularly required to sit, talk, and/or hear. Continual use of the hands with wrist and finger movement using a keyboard is required*.* Specific vision abilities required by this job include long hours viewing a computer monitor screen. The employee may occasionally travel using personal vehicle and/or work outside normal office environment.

*This description is not designed to contain a comprehensive inventory of all responsibilities and qualifications required of all team members assigned to this position. It is intended only to describe the key elements relative to each section. Also, duties and/or requirements of this position may be modified, added or deleted at any time. This supersedes all descriptions previously written for the same position. Unique equivalent skills and experience may possibly substitute for required position requirements.*

*United Way of Northeast Florida is an Equal Opportunity Employer and a Drug Free Work Environment.*