



United Way  
of Northeast Florida

## United Way of Northeast Florida Position Description

<b>Position Title:</b>	<b>Director of Tocqueville</b>
<b>Department:</b>	<b>Resource Development/Major Gifts &amp; Individual Engagement</b>
<b>Reports to:</b>	<b>Head of Major Gifts and Planned Giving</b>
<b>Reviewed:</b>	<b>August 2022 FLSA Status: Exempt</b>

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### **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:**

This is a fundraising position within the United Way of Northeast Florida Resource Development team responsible for the achievement of revenue and engagement goals associated with the growth and development of Tocqueville giving. The position works to build relationships with and provide engagement opportunities for Tocqueville donors (\$10,000+) aligned with United Way's focus areas and initiatives.

United by their commitment to making Northeast Florida a better place to live, work and raise a family, the Tocqueville Society is comprised of more than 200 members making an annual gift of \$10,000 or more.

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

#### **Tocqueville Society Program Management:**

- In partnership with the Head of Major Gifts and Planned Giving, develop and implement a multi-year plan to increase membership and revenue from Tocqueville Society members both inside/outside of the workplace while retaining current members.
- Develop and drive engagement and event plan for the year. Serve as the lead staff to design, promote and implement all aspects of Tocqueville Society events and activities to educate, recognize and thank donors. Set event objectives and measure ROI for each event or activity.

- Coordinate the development of external marketing materials including brochures, advertisements, web content, newsletters and other materials needed to aggressively promote the programs. Ensure pieces are produced accurately and on deadline.
- Assist with preparation of presentations, data analysis and speaking points for Tocqueville chair and Leadership volunteers.
- Provide exceptional staff support to select Tocqueville Leadership volunteers.
- Develop/oversee solicitation mailings and other mailings/communications as part of the solicitation and stewardship process.
- Track, maintain and provide reports on membership numbers and dollars raised from Tocqueville members.
- Serve as the lead staff for editing and reviewing the Tocqueville section of the annual *Leaders in Giving* book.
- Develop and implement strategies to deepen the involvement, understanding, commitment and support of Tocqueville Society donors to United Way.

**Donor Relationship Management:**

- Develop and execute qualification, cultivation, stewardship and recognition plans for Tocqueville level donors.
- Achieve relationship management performance goals (relationship management performance plan) including number of monthly relational visits ~ qualification, cultivation, solicitation and stewardship). Work closely with the Head of Major Gifts and Planned Giving to determine 'moves management' approach to Tocqueville portfolio, with focus on moving Tocqueville donors to Major and Legacy Giving Donors.
- Work closely with the Tocqueville Leadership volunteers, Manager Leadership Giving, campaign staff, Employee Campaign Chairs and other United Way volunteers and staff to identify, cultivate and solicit gifts.
- Retain and cultivate a portfolio of donors and prospects. Personally initiate and cultivate ongoing and year-round one-on-one relationships with constituents that enhance the donor's commitment and lifetime loyalty to United Way. Introduce planned giving opportunities to donors as appropriate.
- Actively engage donors and prospects through events designed to cultivate members and enhance those relationships. Provide consistent follow-up post events to secure commitments or move relationships forward.
- Demonstrate exemplary stewardship by providing engaging and timely feedback on investments. Provide effective recognition for donors through a personalized thank you program.
- Consistently document key conversations with donors and other pertinent information into database.
- Achieve relationship management performance goals (relationship management performance plan) including number of monthly relational visits. Work closely with the Manager Leadership Giving and Head of Major Gifts and Planned Giving to determine 'moves management' approach to Tocqueville Society donor portfolio.

**Experience / Position Requirements:**

- Bachelor's degree required; Business, Marketing or related field preferred.
- Minimum four years' experience in fund-raising or marketing/ business area preferred.
- Demonstrated account management, communication skills, and the ability to listen well.

- The patience and interpersonal skills needed to perceive and react sensitively to the needs and interests of potential donors.
- Proven ability and willingness to solicit major/planned gifts.
- Excellent presentation and training skills.
- The ability to inspire confidence in United Way volunteer leadership, staff and potential donors.
- Strong technical skills, or the ability to acquire such skills through professional training, coupled with the ability to convey major gifts/planned giving concepts into laymen's terms.
- Creativity and marketing skills needed to promote the major gifts/planned giving program to all constituents.
- The successful candidate will be mature, highly motivated, with the highest ethical standards.

**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.

**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.*