

United Way of Northeast Florida Position Description

Position Title: Head of Major Gifts and Planned Giving

Department: Resource Development

Reports to: Chief Development Officer

Reviewed: August 2022 **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.

Diversity, Equity and Inclusion is not only valued and demonstrated in our hiring practices, it is a fundamental part of our mission throughout our organization and the communities we serve.

Purpose of Position:

Leadership for driving significant revenue for mission. The Head of Major Gifts and Planned Giving will lead the implementation of an Anniversary Campaign while concurrently leading \$100,000+ giving and a developing asset-based planned giving program.

By creating a robust strategy and action plan, will help transform how United Way engages the community and individuals in support of the impact agenda.

The ideal candidate will have demonstrated experience in leading capital campaigns, driving 6+ figure giving, and a working understanding of current and deferred asset based planned gifts. This leader will personally carry a portfolio of invested supporters, while growing the pipeline for future significant support within the highest levels of the Tocqueville Society.

Key Responsibilities and Essential Functions:

- Reporting to the Chief Develop Officer, will serve as a key member and leader of the Resource Development Team.
- Actively partner with team of fundraisers including Tocqueville Society, affinity and leadership groups, building individual giving pipeline through active moves management and traction process to meet or exceed all financial and non-financial goals.
- In partnership with the CDO will lead an Anniversary The successful candidate will help forge new relationships to build UWNEFL's visibility, impact, and financial resources.
- Establish and implement the infrastructure needed to grow the solicitation of major and planned gifts. He/She will expand and diversify UWNEFL's donor base through implementing an established Moves Management program and working closely with

other team members to secure funding for new initiatives. In addition, will work closely with both internal and external stakeholders to build fund raising capacity.

- Coordinate and manage the efforts of team members in annual, major and affinity giving.
- Oversee and research funding sources and trends, with foresight, to help position UWNEFL ahead of major funding changes or trends – with special attention to growing the donor base as a reflection of the changing UWNEFL development model and strategic plan
- Utilize data from the Moves Management and Traction program work with other departments to develop predictable reporting of the development program actions and financials
- Collaborate with the major gifts team to develop a 12-month stewardship plan for identified supporters
- Identify, develop, and mentor the development team in:
 - Donor opportunities in planned giving and Anniversary Campaign
 - Training in identification, qualification, cultivation, solicitation and stewardship of donors
 - AFP/PGC/Estate Planners education series
 - Professional growth through Crescendo, Chronicle of Philanthropy and AFP workshops and training opportunities
- Work with Community Impact, Marketing and Finance in developing individual donor proposals from the established library of case statements
- Maintain a donor portfolio between 50 and 125 depending on where each donor is in the moves process
- Produce quarterly and yearly team and individual evaluations, using critical incidence (and input with HR) and traction to assist the team member in reaching their goals
- Be an exceptional communicator and an articulate, passionate and credible public presence for UWNEFL and an effective, strong, inspirational and focused leader within the community

Experience/Position Requirements:

- Bachelor's degree required
- 5 to 10 years of professional experience in a nonprofit organization; demonstrated success in a development function (managing and forging relationships with multiple donor sources)
- 3 to 5 years of professional experience managing and inspiring development teams
- Demonstrated experience in a capital and/or initiative campaign
- Demonstrated experience in constructing successful planned giving opportunities
- Certification in asset-based giving a plus
- Tangible experience of having expanded and cultivated existing donor relationships over time resulting in new and expanded gift opportunities
- Excellent communication skills, both written and oral; ability to influence and engage a wide range of donors and build long-term relationships
- Strong organizational skills
- Flexible and adaptable style; a leader who can positively impact both strategic and tactical fundraising initiatives
- Experience with prospecting tools to identify gift propensity and capacity of individual donors
- Ability to construct, articulate, and implement annual strategic development plan
- Strong organizational and time management skills with exceptional attention to detail

- A professional and resourceful style; the ability to work independently and as a team player, to take initiative, and to manage multiple tasks and projects at a time

Professional Core Competencies Required:

- Talent Management & People Development: Builds and leads a diverse team that enables the organization to succeed; open to new ideas, coaches and mentors employees and teams.
- Business Acumen & Strategic Direction: Understands business of the organization and effective strategy.
- Operational Planning and Execution: Aligns departmental priorities with the greater organization goals, strategy and mission.
- Strategic Relationship Building: Develops and maintains strategic relationships that generate the resources necessary to support United Way's mission.
- Effective and Engaging Communicator: Articulates the United Way message in a way that inspires others to act in service to the organization and the community.
- Embracing and Managing Change: 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.
- 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.

