



UNITED WAY OF LONDON & MIDDLESEX
Position Description

Position:	Resource Development Officer – Major Gifts & Planned Giving
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Reports to: Director, Resource Development

Department: Resource Development

Band: Band 4

Primary Function:

This position is primarily responsible for executing and managing the planned giving component of a comprehensive Major Gifts plan. As well, cultivate and nurture relationships with donors, volunteers, and community stakeholders.

Specific Responsibilities:

- Together with the Director and Associate Director, develop and implement a specific fundraising plan that incorporates major gifts, specialized campaigns, and planned giving
- Together with the Director and Associate Director, develop and implement a comprehensive planned giving program
- Identify and cultivate donors at the \$5,000 plus level
- Identify and cultivate planned giving prospects
- Manage a portfolio of prospects / donors ranging from 100-150 individuals in size, with a minimum of 15 face-to-face calls per month
- Manage the overall solicitation process including preparing proposals and readying volunteers for donor meetings, making the ask
- Assist in the identification, design and implementation of new fundraising opportunities to increase revenue for new initiatives
- Work with Community Partnerships and Investment to develop tailored programs to identify and gain/enhance the interest and involvement of individuals who are capable of making gifts at the major gift level and are consistent with the Community Impact Agenda
- Ensure proper stewardship takes place following a donation
- Train volunteers in cultivation and solicitation activities
- Involve key members of the community and volunteers to ensure the overall success of the program
- Provide leadership in the development of short and long-term strategic fundraising plans and targets
- Responsible for overall budgetary goal of portfolio as defined
- Coordinate MG cultivation and recognition events with assistance from members of the Resource Development team as required
- Maintain prospect and donor database as it relates to the MG campaign
- Attend community events as required
- Work with the Director, Resource Development and Director, Community Engagement to develop marketing materials and market Planned Giving program
- Work to integrate the program as part of the overall development effort
- Work closely with the Director, Associate Director and other members of the team to ensure an aggressive program as it relates to both present day dollars and future planned gifts
- Meet with planned gift prospects and their advisors, prepare financial illustrations of proposed gifts, draft gift agreements for review by prospects and their advisors
- Organize and conduct seminars for prospective donors, professional financial and estate planners and other constituencies
- Write articles for periodic newsletters as necessary
- Establish procedures for tracking and qualifying prospects
- Create Planned Giving policies as required

- Regular communication with workplace campaign staff regarding status of MG donors and develop moves management strategies within workplaces

Key Relationships:

- Director, Resource Development
- Associate Director, MG
- Development Officer, MG
- Associate Director, Campaign
- Resource Development team
- Volunteers
- Donors
- Prospects

Degree of Authority

- Can prepare a budget proposal for resources needed
- Can negotiate sponsorship agreements to defray operating costs
- Can determine approach to specific prospects

Contacts

- Work involves frequent contact with the public, other levels of government/agencies and with a wide variety of staff
- Requires appropriate tact in order to obtain co-operation and approval of action

Staff supervision

- This individual(s) in this is not required to provide guidance to or supervise any other person

Education and Experience

- University graduation (e.g. general B.A.) or equivalent
- Minimum three years fundraising experience, specifically major gifts and planned giving
- Experience in major gifts and planned giving
- Demonstrated successful gift solicitation of \$10,000 plus
- Have the ability to motivate a donor to give at the Major Gift level or to make a planned gift
- A strong ethical and donor-centred fundraising history
- Demonstrated success in coaching and training people in the area of fundraising
- Experience with coordination of volunteers
- Excellent interpersonal skills
- Compelling verbal and written communication abilities
- Sound judgment and decision-making capabilities
- Excellent organizational skills
- Ability to handle highly confidential and sensitive materials and issues with the utmost discretion
- Advanced level of proficiency in Word, PowerPoint, Excel, and database management
- The ability to work both independently and collaboratively in a fast-paced environment
- Community-minded individual that is progressive, innovative, dedicated and gets things done
- Professional demeanour, communicates effectively with all levels of the organization and the public
- Ability to flex work schedule to attend meetings and special events which occur before or after regular office hours

Last Updated: January 2012