

United Way of Roanoke Valley

Job Title: Director of Philanthropy
Department: Resource Development, Marketing, and Communications
Reports to: VP of Advancement
Status: Exempt, Onsite
Date: September 2023

Organization: The mission of United Way of Roanoke Valley (UWRV) is to improve lives by mobilizing the caring power of people in our community. By leading important initiatives and making strategic investments in health and human service partners, we work toward our goal of positively and sustainably changing community conditions.

Please visit www.uwrv.org to learn more about United Way of Roanoke Valley.

Summary: The Director of Philanthropy is responsible for discovering, cultivating and expanding significant donor relationships and stewarding major gifts across UWRV's portfolio. This position develops and executes intentional relationship and moves-management strategies toward the achievement of growth, retention, participation and revenue goals for the organization. They plan and coordinate all aspects of fund development in accordance with UWRV's mission and vision, with special emphasis given to Alexis de Tocqueville membership growth.

Responsibilities include providing leadership in fundraising initiatives including special events, major gifts, endowment, planned giving and supports top sponsorship acquisition. They are responsible for formulating a funding strategy and executing a development plan which deepens the commitment of existing donors, increases the number of overall supporters and creates opportunities for all to contribute to United Way's work in practical and meaningful ways.

This individual works in a team environment with the CEO, VP for Advancement, other staff and key volunteers. The Director of Philanthropy must cultivate mutually beneficial relationships in order to achieve significant short and long-term fund raising goals and must provide direction, training and support to staff.

The Director of Philanthropy must exemplify United Way of Roanoke Valley's mission, vision and values, including exhibiting confidentiality when working with sensitive and personal information, and a sensitivity and respect for cultural diversity.

Commitment to equity, diversity & inclusion

We take the broadest possible view of diversity.

We value the visible and invisible qualities that make you who you are.

We welcome that every person brings a unique perspective and experience to advance our mission and progress our fight for the health, education, and financial stability of every person in every community.

We believe that each United Way community member, donor, volunteer, advocate, and employee must have equal access to solving community problems.

We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business and our communities.

Cultural Competence: The Director of Philanthropy adopts a lens of cultural competency that conveys empathy, support, and an understanding of the people they work with both internally and externally, engage with, and the people they serve. This competency helps to build trust and effective engagement, build stronger relationships, expand our organization's reach, and more effectively and respectfully engage with people regardless of background.

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Core Competencies are characteristics that all employees are expected to exhibit as a member of the UWRV team. For complete details that include attributes and behaviors please see the United Way Core Competencies Checklist in the shared Human Resources Network Folder. These include:

- **Mission Focused:** Top priority is creating real social change that leads to better lives and healthier communities.
- **Relationship Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results Driven:** Dedicated 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 his/her role in growing and protecting the reputation and results of the organization, and thus, the greater network.

Additionally, members of the UWRV team should exhibit the following competencies:

- **Effective Communication:** Skilled and passionate communicators who articulate our message in a way that inspires other to act in service to the organization and community; and, promotes and sells ideas persuasively, in order to shape the opinions of key stakeholders and promote and project a positive image of the organization.
- **Adaptability and Change Management:** champion and facilitate change to ensure long-term community sustainability by adapting successfully to changing needs while maintaining positive relationships with internal and external constituents.
- **Cross-Functional Capability and Collaboration:** Effectively works cross-functionally using a team-oriented mindset and approach to collaborate for results based on knowledge of current conditions and future trends both internally and externally.

And as a key team member of the fundraising team, the Director of Philanthropy should exhibit the following competencies:

- **Effective Fundraising:** Donor focused and results-driven, with a relentless focus on gaining financial resources to support United Way's mission and community impact strategic objectives.
- **Strategic Relationship Management:** Develops and maintains strategic relationships that generate the financial resources necessary to support the mission by building trust and donor commitment to UWRV.
- **Effective and Engaging Communication:** Effective and passionate communicator who articulates our message in a way that inspires others to act through designing, shaping and executing comprehensive, multi-faceted stakeholder plans that support our strategy and objectives, builds relationships and works to position UWRV as a leader in community impact.
- **Entrepreneurial and Innovative:** Creatively seeks new opportunities to generate revenue and other resources that add greater value to the organization and the community through understanding and contributing to the product development process by assessing donor's interest and conveying them accurately to the cross-functional team.

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- **Volunteer Management:** Works to build organizational capacity through volunteer collaboration and develops high-impact, meaningful volunteer opportunities that increase revenue, impact, outcomes and influence.

Key Accountabilities include the following:

1. Identifying, cultivating, and expanding significant individual donor relationships across the UWRV's portfolio.
2. Ensures the development and execution of comprehensive relationship management strategies and the achievement of assigned growth, retention, participation, and revenue goals for the individuals within assigned portfolio.
3. Tailors and executes the initiatives necessary to establish and preserve the United Way as the primary philanthropic conduit between individuals, their employers, and the communities in which they operate.
4. Ensures the delivery of a year-round engaging experience for key donors and volunteers.

Essential Duties and Responsibilities include the following:

1. Major Donor Fund Development (85%)
 - Personally initiates and cultivates one-to-one relationships with 100+ current and prospective major donors (gifts of \$5K and above), with special emphasis given to growing the Alexis de Tocqueville Society (annual gifts of \$10,000+).
 - Develops strategic, year-round, sustainable relationships with donors in assigned portfolio to complete qualification, cultivation, solicitation, and stewardship. Execute on custom strategy for each donor to increase retention and encourage higher levels of giving by prioritizing time with donors out of the office over other functions.
 - Ensures a comprehensive understanding of donors' backgrounds. Identifies the philanthropic goals and objectives of each assigned donor, establishing oneself as a primary resource and contact in their relationship with UWRV.
 - Collaborates with Marketing, Community Impact, Finance and Volunteer Connection to tailor strategies for the individuals and prospects within assigned portfolio.
 - Achieves ambitious annual metric goals set in partnership with CEO and VP of Advancement pertaining to:
 - Visits/touchpoints with future or existing leadership donors
 - Solicitations for mid and major level gifts and planned gifts
 - Dollars closed in major gifts
 - Solicit and closes five and six figure annual gifts, endowments and/or planned gifts to UWRV. On an ongoing basis, utilize CEO, VP for Advancement and key volunteer leaders to enhance philanthropic gift opportunities and options and increase donor's (and prospects) involvement.
 - In partnership with the CEO and VP for Advancement execute on a plan to thank and recognize donors in personalized and creative ways. Plan and execute special events for donors, prospects. Participate in United Way, community, and funded agency events.
 - Steward and grow the planned giving program. Integrate planned giving program donor cultivation and solicitation efforts.
 - Ensures the Customer Relationship Management (CRM) database and process for the individuals and prospects within assigned portfolio is managed, analyzing data

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- and reports for opportunity and risk identification. Tracks and evaluates effectiveness of strategies, campaigns, and overall results.
 - Represents United Way with a variety of external constituencies with high wealth and establish a dialogue about philanthropic values and priorities.
2. Staff and Board relationships (15%)
 - Assists in training RD staff in fundraising principles, systems and processes
 - Participates in strategic development of short and long-term departmental goals;
 - Leads, supports and empowers volunteer through active communication and delegation.
 - This position also initiates or is directed by President and CEO to perform additional duties or tasks to support United Way's mission.

Supervisory Responsibilities: Oversee other UW staff, volunteers and interns on a project-basis, as assigned.

Education and/or Experience:

These following encompass the essential education and experience requirements for the Director of Philanthropy:

1. Bachelor's degree or related training/experience is required. Master's or other advanced degree preferred.
2. Eight or more years of professional work experience, with five or more years previous experience in a fundraising, development, sales, communication and/or public relations capacity required. Proven track record of successfully building and growing relationships with donors, companies, etc. that result in increased revenue.
3. Thorough working knowledge of relationship-based fund raising procedures and philosophies. Familiarity with all aspects of fund development including major and planned gifts, endowments, capital campaigns, annual giving and large special events. CDE, CFRE or other fundraising certification is ideal.
4. Proven ability to work independently with minimal supervision; and build strong collaborative relationships across the organization to work cooperatively and flexibly as part of a team.
5. Proven project management skills, including the ability to balance multiple projects in varying degrees of implementation. Demonstrated ability to plan, schedule, prioritize, coordinate, delegate and manage multiple work activities remotely.

Language Skills: Outstanding written and verbal communication skills required, including public speaking and presentation skills. Excellent listening skills, with the proven ability to solicit information from others.

Computer and Analytic Skills: Proficiency in Microsoft Office suite programs. Comfortable using databases, social media, and web-based tools/applications.

Licenses: Valid Virginia Driver's License

Physical Demands: 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.

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While performing the duties of this job, the employee is regularly required to sit, talk and/or hear. The employee is frequently required to use finger and hand motion and occasionally required to stand walk and reach with hands and arms. The employee must frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, depth perception and ability to adjust focus.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Frequent local travel within the regional area, including occasional evenings and weekends. Reliable personal transportation required. Extended viewing of computer monitor.

Statements in this Position Description are intended to describe the general nature of the work being performed. They are not intended to be a complete list of all responsibilities, duties and skills required for the position.

UWRV offers excellent benefits, a great work environment and is an equal opportunity employer.