



United Way
Central & South
Okanagan Similkameen

Job Posting: Resource Development Manager – Individual Giving

Details: Competitive salary and benefits

Full-time contract, based at United Way's office in Kelowna, BC

United Way Central and South Okanagan Similkameen (CSO) is looking for an experienced individual giving fundraiser to join our small, but perfectly formed team, based in beautiful Kelowna, in the Okanagan Valley. United Way fundraising traditionally focuses on employee and workplace giving. Looking to the future, we are focusing more on engaging individual donors with opportunities that resonate and meet their philanthropic goals. In fact, this is a major strand of our new strategic plan. If you have a successful track record in individual giving, major gifts and planned giving, and want to be part of creating real and lasting change in your community, we would love to hear from you!

To Apply:

Please apply with your resume and a short cover letter to info@unitedwaycso.com, explaining your motivation for applying and how your skills fit the bill. Please reference "Resource Development Manager" in the subject line.

Closing date is **5pm, Thursday July 31st 2018**. We are a small team and so we will only be able contact those selected for interview. Thanks for your understanding.

To get a feel for our work in the community and learn more about us, please visit www.unitedwaycso.com

Role Purpose:

To lead United Way's Donor Stewardship Program, including stewardship of UW CSO Individual Donors, Planned Giving and Major Gifts Programs.

Responsibilities:

Annual Giving

- Developing and implementing multi-year individual giving strategies that support and advance the strategic direction of United Way CSO. This includes acquisition, cultivating, engaging, soliciting, and stewarding current and potential donors.
- Assessing donors' needs and interests and packaging United Way's work into initiatives that effectively meet those needs and drive revenue.
- Coordinate timely and accurate communications to all community individual donors and track responses to ensure all community donors have had the opportunity to donate, including past donors.
- Regularly research stewardship opportunities through online prospecting research software (iWave) and other sources (obituaries for example), implementing as appropriate and communicating prospecting updates to the Executive Director for the purposes of cultivation, solicitation, recognition, and stewardship.
- Ensure timely and accurate acknowledgement, thanking, recognition, and excellent customer service, including through appreciation events.
- Train and manage volunteers to support donor stewardship, including through semi-annual thank-a-thon.
- Ensure timely and accurate receipting within the donor relations guidelines.

- Maintaining accurate updated information in United Way CSO's CRM system (Andar).
- Maintaining donor stewardship and associated fundraising policies and procedures.
- Other duties as assigned or that may arise as part of organizational requirements, specifically including support to the annual workplace campaign.

Planned Giving

- Collaborate with Executive Director to develop and execute annual and multi-year strategies for Planned Giving.
- Cultivate relationship with lawyers, accountants, trust officers, financial planners, and other professionals to make them aware of, and keep them up to date on, the services and programs at United Way CSO and opportunities for funding by their clients.
- Identify, cultivate, and solicit potential planned gift donors in collaboration with Executive Director
- Maintain information on prospects and donors in CRM.
- Maintain (and get maximum value out of) annual membership with the Canadian Association Gift Planners (CAGP).

Qualifications and Experience:

- Post-secondary certificate/diploma/degree from a recognized institution, preferably in Business Administration, Fundraising or other relationship-based profession (or an equivalent combination of education and experience).
- Minimum two years recent related experience in individual giving.
- Experience with a donor relationship management database system, as well as proven capabilities with financial reporting and tracking software (CRM).

Core Competencies:

- Strengths in communication, leadership, and initiative.
- A strong track record in relationship-based fundraising, including the cultivation, solicitation, and closing of donor acquisitions.
- Strength in managing and maintaining long-standing donor relationships.
- Professional approach to time management.
- Strong judgement and problem solving skills.
- Excellent teamwork, interpersonal and customer service skills.
- Above average computer skills.
- Valid driver's license and access to a vehicle.
- Flexibility in hours of work – available evening and weekends as work demands
- Ability to present a clear police background check