

Our mission is to improve lives and our community by engaging people to give, advocate and volunteer.

## METRO UNITED WAY JOB DESCRIPTION

<b>Position Title: Director, Major and Legacy Gifts</b>	<b>Department: Development</b>
<b>Incumbent: N/A</b>	<b>Reports to: Chief Development Officer</b>
<b>Supervises: Senior Manager for Leadership and Legacy Giving, Development Assistant</b>	<b>Last Review: December 2020</b>
<b>Labor Grade: Management 2, Grade 19</b>	<b>Last Update: December 2020</b>
<b>FLSA: Exempt</b>	

### Metro United Way Vision and Mission

Metro United Way is a force for positive change. We envision a community where people achieve their fullest potential through education, financial stability and healthy lives. With the generous support of individuals, corporations, foundations and strategic partners, we are uniquely positioned to make a significant, lasting impact in our fight for the education, financial stability and health of every person in the seven-county region we serve.

For more than a century, we've worked to help meet the needs of our community's most vulnerable members. As we move into our next 100 years, we are focused on not simply meeting those needs, but on how to break the cycle of poverty that holds individuals and our communities back from reaching our full potential. This will mean a rethinking of how we approach our work and enable different approaches to wrap around services and collaborate with greater ease and impact.

There is no single solution. The key to social change is how we work together. The world is full of people and organizations dedicated to helping others. But thousands of individual efforts don't necessarily add up to widespread progress. That's why our approach is so effective - we are on the ground, working with nonprofits, businesses and government to lead collective action that drives results at scale.

### Position Summary

The Director of Major and Legacy Gifts supports the mission of Metro United Way by leading the development and execution of strategies that secure Major/Principal gifts, both annual and planned, in support of our strategic objectives. This position is responsible for cultivating, developing and managing relationships with individual donors and potential donors (both inside and outside the workplace).

This is primarily an external-facing role that works closely with volunteers, community partners, donors, and colleagues in a team-based approach to maximize engagement and revenue from Major/Principal and Legacy donors.

## Position Responsibilities

1. Works with CEO, Chief Development Officer, Board of Directors, Tocqueville (Major Giving Society) Advisory Boards, Annual Cabinet, and colleagues, including direct reports, to develop, implement and sustain strategies for soliciting Major/Principal and Legacy Gifts. This includes:
  - a. Identifying donors' areas of interests through relationship development and aligning those interests with strategies/products/programs of MUW.
  - b. Creating individual, strategic cultivation plans for MUW's most important major/principal and legacy gift prospects.
  - c. Attaining fundraising goals from major/principal and legacy gift donors – with a focus on converting existing Tocqueville society and multi-decade donors into Planned and/or Endowment donors.
2. Identify, cultivate, solicit and steward individual prospects, both local and national, for major gifts. Evaluate the capacity of these donors and prospects to increase their giving and personal commitment to MUW, now and in the future. Collaborate across the full organization on major gifts opportunities. Work closely with the Director of Grant Development to leverage the maximum philanthropic potential of prospects when formal written proposals are requested by donors/prospects.
3. Chair cross-functional Major Gifts team meetings, which include the CEO, Chief Development Officer, Sr. Director of Development, direct reports, and other colleagues as needed, to advance Major/Principal and Legacy giving strategies and goals.
4. Co-chair Alexis de Tocqueville Advisory Board, alongside volunteer chair, to maximize engagement of existing Major donors, secure new Major/Principal and Legacy donors, and inform organizational fundraising strategy
5. Supervise 1-2 direct reports and lead them to achieve shared goals and grow in their leadership and competencies in Major/Principal and Legacy giving efforts.
6. Lead efforts to retain and grow major gift support, focusing on strategic priorities to improve the percentage of resources under our management (aka unrestricted funding), and help to build a sustainable stream of funding for the organization as a whole.
7. In conjunction with Marketing, Engagement and Community Impact departments, identify and lead prospect specific solicitation teams involving MUW executive staff and volunteers, providing leadership and direction. Trains volunteers and Community Giving staff on best practices and strategies for major gift solicitation – with a focus on training all fundraisers to secure basic planned gifts (such as will provisions).
8. Once funding is secured, create and conduct programs of stewardship for donors, and serve as the primary point of contact and relationship manager for major donors.
9. Maintain contact histories in ANDAR (Metro United Way's CRM database) regarding all major gifts activities and related information.
10. Network and actively promote MUW with key individuals and at community functions.

11. Support MUW senior management in working toward the goals and objectives of Metro United Way.

12. Other duties as assigned.

### **Knowledge, Skills, Abilities**

- Relationship-oriented development professional with a history of success and accomplishment in major gift solicitation.
- Education/Experience: Ten years' experience in principal and major gift fundraising.
- Superior verbal and written communication skills.
- Extensive knowledge of and well-connected to the community and its resources.
- Computer/Office Skills: Strong proficiency in Microsoft Office applications including Word, Excel, and PowerPoint.
- Well-organized, personable and able to motivate and manage volunteers.
- Must be able to take initiative, create and execute strategies, demonstrate leadership, work independently and produce consistently high-quality work.
- Strong staff management skills, including coaching, development and performance management.
- Very high level of integrity, professionalism and sense of confidentiality.
- Ability to analyze and exercise sound judgment
- Must be bondable
- Must be able to work nights, weekends and other unusual hours when necessary.

### **Organizational Core Competencies Required**

- **Adaptability:** anticipates changing circumstances and acts proactively to prevent crises; responds in an open-minded, constructive and focused way.
- **Customer Relationship Management:** puts the customer at the center of every activity, process and communication; engages customers to improve their experience with the MUW brand.
- **Communication:** demonstrates effective verbal and written skills; utilizes various styles to get ideas across; confirms what is said to ensure mutual understanding.
- **Results Orientation:** is outcome oriented in decisions and actions; thinks in terms of "what can I accomplish?"
- **Self/Staff Development:** actively participates in self-development through learning and development opportunities; seeks out opportunities to become not only more proficient in his/her role, but to gain more knowledge of the organization.
- **Strategic Thinking:** utilizes knowledge of the industry to leverage the organization's strengths; seeks out new channels and venues to deliver MUW's message.
- **Technical Expertise:** commands a thorough understanding of the subject matter for their role; keeps current and up to date with new information for their role.
- **Accountability/Brand Stewardship:** takes responsibility for the use and protection of all resources in his/her control; ensures use of resources that aligns with the mission of MUW as well as with customer expectations.

### **Behavioral Expectations**

- Represents Metro United Way positively, professionally, courteously and effectively.
- Assists or takes on new tasks to help Metro United Way achieve its mission.

- Integrates Metro United Way's business strategies by building positive internal and external relationships.
- Maintains confidentiality regarding personnel and organizational information.
- Adheres to and models the Metro United Way Code of Ethics at all times.
- This position may require the agreement to and execution of a non-compete/non-solicitation agreement.

Note: The description given is intended only to provide information about the general nature of the job and is not an all-inclusive list of the job duties, skills or abilities which may change.