

Job Description

Position: Donor Relations Officer – Individual and Planned Giving

Union: CUPE Local 50

Salary Grade: Grade 9 - \$2,352.69 - \$2,423.29 Biweekly, COLA of 0.50%

United Way Southern Vancouver Island is a leading community impact organization working to transform lives on Southern Vancouver Island. As part of our United Way team, you can make your community better while growing professionally in the process.

Job Summary:

The Donor Relations Officer (DRO) position for Individual and Planned Giving reports directly to the Director of Development and is a key fundraising and relationship management position within an integrated donor relations team. The incumbent will have strong interpersonal and organizational skills and will drive revenue growth and build key relationships with donors, volunteers, and key community stakeholders.

General Accountability:

The incumbent performs all duties and activities in accordance with the Vision, Mission, and Values of the United Way of Southern Vancouver Island (UWSVI) and adheres to the organization's policies and procedures at all times.

The DRO works in tandem with the Director of Development and often independently with individual donors. The work involves utilizing specialized skills in individual giving, donor development, and volunteer management with strong knowledge and tactics to move prospects along the donor cycle and increase donor interest and investment in support of United Way's key priorities. The successful candidate will develop, implement and manage donor cultivation, solicitation and stewardship plans with effective fundraising strategies to grow and diversify revenue streams.

The incumbent is experienced in planned giving and understands the various giving options such as bequests, gifts of securities, gifts of life insurance and property. Collaboration with professional financial advisors and individuals is critical to success.

The DRO will be responsible for building and strengthening productive, trusting, and respectful relationships with a wide array of donors and stakeholders to maximize revenue generation in each fiscal year.

The incumbent must be skilled in delivering presentations to small and larger audiences. This position impacts external relationships, revenue generation, organizational image, and operational effectiveness.

Specific Accountabilities:

To meet the requirements of the position the DRO is specifically accountable for:

- Develops engagement, cultivation and stewardship strategies and objectives to achieve target

Date Created: March 2019

Last Updated: February 14, 2023

results in our leadership giving (\$1,200-\$5,000) and legacy giving program

- Analyzes core donors to monitor giving patterns and demographic information to acquire legacy leads and upgrade to the leadership giving level.
- Works collaboratively with others especially when decisions impact more than one area or have significant impact on a segment of internal or external stakeholders
- Develops relationships with individual donors, allied professionals and select campaign individuals. This will include creating opportunities and tactical plans for year-round engagement with donors
- Create legacy gift qualification and cultivation plans to secure legacy gift prospects and steward existing legacy donors as part of our Legacy Circle Program
- Implements a comprehensive legacy giving plan that identifies legacy leads and expectants, and encourages legacy commitments
- Identifies and tracks donor milestones at all levels (longevity/years of giving or financial milestones) and implements appropriate recognition strategies
- Shares information with donors and allied professionals on the mission, vision and work of the UWSVI
- Maintains and updates legacy giving documentation and collateral, in collaboration with the Marketing Communications team
- Ensures that donor details are accurate and up to date in our CRM software: maintains and produces electronic and paper files, reports and analysis
- Works closely with the Director of Development, to ensure an aligned and effective donor-centric approach
- Provides support as assigned in organizing special events
- Provides information to individuals who organize third party fundraising events, including CRA guidelines for tax receipting purposes
- Maintain a flexible work schedule to meet the demands of the organization

Skills and Skills Abilities:

- Donor-centric, where requests from internal and external stakeholders are responded to with high-degree of urgency, professionalism, and accuracy
- Strong organizational skills and multi-tasking skills
- Working knowledge of CRA regulations pertaining to charitable giving, an asset
- Excellent interpersonal skills; engaging, approachable, a listener
- Leveraging and prospecting leads and key contacts e.g., Allied professionals
- Strong presentation and training skills
- Problem solving and analytical skills
- Able to adjust work schedule to accommodate donor schedules
- Ability to establish long-term, collaborative relationships with colleagues build on trust, respect, humility, and openness
- Values diversity, equity, and inclusion

Education and Experience

- Post-secondary degree in a discipline related to the duties of the position (Business Administration, Communications, Public Relations) and/or equivalent combination of training, experience, and professional affiliation
- Proven track record of identifying, cultivating, and securing donations and legacy gifts from individual
- Experience with individual giving in the \$1k to \$10K range is considered a strong asset

- Meeting and exceeding fundraising targets
- Experience in relationship development, moves management, fund development, sales and/or marketing is required
- High proficiency with Microsoft computer applications, including Word, Excel, PowerPoint, Outlook
- Strong database management experience with CRM
- This position requires a valid BC driver's license

Core Competencies:

Mission-Focused

The UWSVI's top priority is to create real social change that leads to better lives and healthier communities.

Relationship-Oriented

The incumbent understands that people come first and is astute in cultivating and managing relationships toward a common goal.

Collaborator

The incumbent understands the roles and contributions of all sectors of the community can mobilize resources through meaningful engagement.

Results-Driven

The incumbent is dedicated to shared and measurable goals for the common good, creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.

The United Way Southern Vancouver Island is a unionized workplace. Salary and benefits for this position are payable in accordance with the CUPE 50 collective agreement.

The above reflects the general details to describe and evaluate the principal functions of the job identified and shall not be taken as a detailed description of all the work requirements.