



United Way of Tucson  
and Southern Arizona

## UNITED WAY OF TUCSON AND SOUTHERN ARIZONA Position Description

### DIRECTOR, LEGACY GIVING & ENDOWMENT Full Time, Exempt May, 2021

#### **JOB DESCRIPTION:**

The Director of Legacy Giving & Endowment coordinates all aspects of high-level donor relationship management with regard to Planned Giving. Reporting to the Chief Development Officer of Resource Development, the Director of Legacy Giving will lead, drive and catalyze innovations to both maintain and develop United Way of Tucson and Southern Arizona's presence in the area of Planned Giving. This position, working in tandem with Workplace Campaign and Major Gifts is responsible for guiding staff in building relationships with current and potential Leadership Givers, Major Donors, and Legacy Givers, raising the resources necessary to fund United Way of Tucson and Southern Arizona programs and operations. Focus on fundraising for both annual and Endowment campaigns from individuals who can make gifts of \$10,000 or more, with a focus on six, seven and eight figure gifts.

A high degree of self-direction and initiative is required to be successful in this role. All United Way of Tucson and Southern Arizona (UWTSA) programs and strategies work toward eliminating racial, ethnic, and socio-economic disparities for an educated, thriving, and equitable community.

#### **Responsibilities:**

##### **Legacy Giving & Endowment**

- Design, organize, direct, and implement strategy to segment, prospect, cultivate, solicit and grow Legacy Giving and Endowment.
- Through Planned Giving initiatives, provide annual Legacy Giving & Endowment plan, coordinate Legacy Giving Committee and Legacy Giving Events, create Legacy Giving Welcome Packets and Acknowledgements.
- Provide training and information to the Resource Development team to assist in managing, soliciting and recognizing Legacy Givers and Prospects within their areas of responsibility and help to transition these donors from the annual workplace campaign.
- Manage relationships with prospective and current donors that can make planned gifts of \$10,000 or more. Identify, qualify, cultivate, solicit and steward same.
  - Participate in all aspects of the gift cycle:
    - Initiate contacts with potential Legacy Givers.
    - Develop appropriate cultivation strategies for them, including working with volunteers.
    - Develop and maintain effective communication plan that keeps donors and prospects informed and involved with United Way of Tucson and Southern Arizona.
    - Move potential donors in an appropriate and timely fashion toward solicitation and closure.
    - Make solicitations when appropriate.

- Maintain stewardship contacts with donors; adhere to the highest ethical standards; demonstrate empathetic disposition, and perseverance; reflect optimistic and positive attitude, and convey sensitivity to needs of the donors.
- Participate in 10 donor meetings a month. With at least two solicitations of a legacy gift per month. Goal to close \$500,000 in new major and planned gifts in a year.
- Ensure that collateral materials and recognition programs are timely, effective and appropriate.
- Work collaboratively with and in support of volunteers, other development staff, and other United Way staff to achieve the needs of the prospects.
- Participate in prospect management meetings to ensure coordination of cultivation, solicitation, and stewardship activities.
- Attend United Way events as well as outside events for United Way representation, networking etc.
- Responsible for soliciting gifts of \$10,000 and higher from individuals for both Planned Giving and Endowment.

### **Volunteer Management**

- Prepare committee volunteers for prospect calls, committee meetings, reports, public appearances and any other function of responsibility.
- Train volunteers about the United Way community impact work and their role and responsibilities on the Legacy Giving Committee.
- Utilize volunteer's skills and knowledge to call on assigned prospects and implement campaign practices and strategies.
- Communicate challenges and successes to campaign volunteers throughout campaign.

### **Management and Administrative Functions**

- Direct and manage, interns, consultants, and volunteers. Ensure staff work plans meet organizational goals and objectives.
- Utilize volunteer's skills and knowledge to call on assigned individuals and accounts to increase Legacy Giving.
- Maintain donor and prospect records and current files.
- Create, modify, and maintain routine and special letters, memos, and reports using word processing, database, spreadsheet and other software packages.
- Monitor and track progress and provide analysis to CDO of RD for forecasting and use by the RD Team, Campaign Cabinet and Board of Directors.
- Assist CDO of RD with timely planning and completion of necessary Campaign marketing strategies and materials to support success of annual goals and objectives.
- Perform analysis and track appropriate department budget expenditures to provide accurate and up to date information for the CDO of RD to use in senior level reporting, forecasting and future departmental planning needs.
- Perform duties in accordance with United Way of Tucson and Southern Arizona policies and procedures such as managing/attending staff meetings, completing accurate and timely timesheets and expense reports.
- Provide excellent customer service as a component of all job duties.

### **Other Duties as Assigned**

**Qualifications, Skills and Abilities:**

- Bachelor's degree in business, communications or related field, or equivalent combination of education and work experience.
- Three to five years experience in resource development, legacy giving, donor relations or related field.
- Experience and success in managing relationships and securing support from accounts and individuals.
- Desire and ability to work in team-oriented work environment.
- Demonstrated supervisory experience and ability to motivate and manage staff, donors, and volunteers.
- Ability to tactfully handle stressful situations, negotiate and resolve conflicts, maintain confidentiality and to respect and observe organizational protocol.
- Ability to motivate and manage donors, volunteers and staff.
- Excellent written and verbal communication, public speaking, training, facilitation, administrative and interpersonal skills.
- Event planning and management, accounting, budget development and management skills.
- Computer skills including CRM, Windows-based software (Word and Excel), e-mail and calendar, and presentation software.
- Ability to maintain a flexible work schedule and adjust it as required by changing activities.
- Must possess a valid driver's license, current auto insurance, daily access to a reliable vehicle and able to lift up to 30 pounds.
- Ability to travel to work in a variety of locations throughout the metropolitan Tucson area.

Thank you for your interest in this position. Please email your resume and cover letter to [hr@unitedwaytucson.org](mailto:hr@unitedwaytucson.org)