

PERFORMANCE PROFILE FOR:

Senior Director of Advancement

INVEST. CONNECT. SERVE.



ORGANIZATION:

- Function:** Lead, mentor and inspire a development team to achieve the mission of the United Way of Greater Rochester (“the organization”)
- Required Experience:** A bachelor’ degree and a minimum of seven years of fundraising experience; OR consultative sales experience combined with NFP leadership experience (at management or board level).
- Position Location:** Rochester, NY

United Way of Greater Rochester

The mission of the United Way of Greater Rochester is to unite the good will and resources of the Greater Rochester Community so everyone can thrive. The organization achieves its mission in a variety of ways, the most visible being the annual fundraising campaign for the Community Fund.

United Way of Greater Rochester’s funding process is fair and balanced, using **qualitative and quantitative data** on an ongoing basis to best serve the ever-changing, complex, and inter-dependent needs of the community. **The organization currently focuses fundraising efforts for the Community Fund around the following four major areas* of impact and need:**

- Helping people meet their basic needs of food, shelter, and clothing so they can focus on addressing other major life concerns;
- Giving babies a healthy start to life with support for new parents;
- Setting students on a path for success in school, work, and life;
- Supporting our aging population and those who are caring for elders locally.

**Addressing poverty-related challenges and providing inclusive services for people with disabilities are overarching standards throughout all community impact strategies and investments.*

United Way of Greater Rochester also honors its mission by making sure that all programs and initiatives supported by United Way Community Fund donations are monitored, measured, and evaluated, confirming positive results for our community and local people in need.

In the most recent funding year, the United Way of Greater Rochester team raised \$25.4 million, a feat that must be repeated each year to support the ongoing needs of the Greater Rochester community. Of that total, \$13.8 million supported 76 vetted Community Fund partners (direct service providers) who in turn provided services within the four aforementioned impact areas. Most of the remaining balance of \$11.2 million represented funds collected from donors by United Way of Greater Rochester and distributed to not-for-profit organizations outside of the Community Fund, as directly designated by those donors.

In summary, the United Way of Greater Rochester executes a *community planning* approach to make sure resources are concentrated on solving the community's highest impact problems through the community's most efficient service provider organizations.

Additional mission-driven initiatives undertaken by United Way of Greater Rochester:

- In addition to the aforementioned activities, the organization also encourages collaboration across not-for-profit agencies on a regular and/or ad hoc basis, serving as a catalyst for action and as an unbiased convener of interested parties who have the capacity to take on emerging community issues. One such initiative convened by United Way of Greater Rochester is the Rochester-Monroe Anti-Poverty Initiative, whereby community leaders and not-for-profit agencies combined efforts on a common goal to reduce poverty in the Rochester and Monroe County region by 50 percent over the next 15 years.
- United Way of Greater Rochester prides itself on the creation and ongoing support of six affinity groups: The Tocqueville Society, Circulo Latino Leadership Society, Emerging Leaders Society, Women's Leadership Council, African American Leadership Society, and Labor Leaders Club. Members of each affinity group contribute \$1,000 per year, demonstrating their personal commitment to resolving community challenges (\$10,000 per year for Tocqueville Society members, and \$500 per year for members of the Emerging Leaders Society). Members of each affinity group are offered opportunities throughout the year to network, volunteer and participate in community-building activities with other local leaders.

Part of a larger family

United Way of Greater Rochester is part of United Way Worldwide, headquartered in Alexandria VA, a non-profit organization that assists the efforts of over 1200 United Way chapters across the country. Closer to home, United Way of Greater Rochester partners with local United Ways across Genesee, Livingston, Monroe, Wayne, Wyoming and Ontario counties on key initiatives, community outreach, donation processing and administrative support.

Point of Pride- one of the lowest administrative cost ratios in the country

United Way of Greater Rochester's administrative expense is regularly at 8% or lower each year, putting 92% of each donor's contribution to work. Administrative expense ratios of 15% or less are considered acceptable, so United Way of Greater Rochester's low cost base is considered exemplary.

THE OPPORTUNITY

The winning candidate will inspire and lead a talented team of development professionals in the achievement of United Way of Greater Rochester's mission.

The next Senior Director of Advancement ("SDA") of the United Way of Greater Rochester will be taking charge of an experienced, talented development team that is well-aligned with the mission and strategic goals of the organization. This rare opportunity is available for all the right reasons - the prior Development leader was recently promoted to COO and, along with the senior leadership team, is credited with creating a culture of dedication and empowerment. The next SDA will be expected to build on this re-energized culture, leading and inspiring staff to unleash their talent in service of the organization's mission.

The SDA will be joining a staff of 60 full-time and 5 part-time employees, where staff turnover is low and employee satisfaction is high. Staff at all levels of the organization describe a work atmosphere of empowerment and collaboration, where everyone can "connect the dots" between his/her work and the greater mission of the organization.

Reversing trends and creative approaches

United Way of Greater Rochester has recently turned the tide of decreasing trends in contributions to the organization's annual campaign. Historically, United Way of Greater Rochester's fundraising success was heavily dependent on the success of workplace campaigns, where corporations encouraged employees to donate, usually through regular payroll deductions. While still an important part of United Way of Greater Rochester's fundraising strategy, some of the biggest corporate contributors in the Greater Rochester region have decreased employee headcount over the past 15+ years. Oftentimes, United Way of Greater Rochester's relationship with the end-donor - the former corporate employee - was unintentionally severed as a result.

United Way of Greater Rochester's fundraising team has worked hard to minimize the impact of declining donor numbers over the years, and is now moving toward a reversed trend. For the first time in eleven years, United Way of Greater Rochester achieved their ambitious goal to increase annual campaign results for each of the past two years. The new SDA will be joining an organization that is trending in the right direction, leading the nineteen-person staff of the Resource Development Department to greater success. As a member of United Way of Greater Rochester's senior leadership, the successful candidate will leverage his/her fundraising experience and vibrant network to develop relationships with new funding sources. For example, the SDA will team with staff to identify and execute creative strategies to build more relationships directly with individual donors, capitalizing on the fact that a new generation of emerging leaders may have no prior exposure to United Way and its mission. Government grants and foundations are additional examples of funding sources in need of further development. The successful candidate will also look for strategies to develop more relationships with small to mid-sized organizations, both at the corporate level and employee level, as many former employees of our region's largest employers have formed new organizations but may be undeveloped as United Way prospects.



The SDA will have ultimate responsibility for the success of United Way of Greater Rochester's overall fundraising efforts, including but not limited to corporate, workplace and individual donors, planned giving, grants, foundations, government support and affinity group support.

Leadership by Example

The new SDA will be an accomplished fundraiser who is fearless when it comes to asking for support. He/She will first lead by example, asking for volunteers, corporate, and individual donations as dictated by a well-designed long-term relationship development plan. More importantly however, the successful candidate will inspire, motivate, and mentor staff under management to do the same, coaching them to their higher and higher levels of proficiency and success.

The Board of Directors will look to the new SDA for inspiration as well, taking strategic direction on how to best leverage the board's talent and connections for the betterment of United Way of Greater Rochester. The SDA will hold the board accountable for results with the support of the COO and CEO.

"Face of the Agency"

The successful candidate will share "Face of the Agency" responsibilities with the COO and CEO, attending corporate, community and donor events as the subject-matter-expert for the mission and strategies of United Way, the programs it supports, and collaborative community initiative. The SDA will be an experienced, successful public speaker with a gift for summarizing and simplifying complicated inter-dependent community relationships. The right candidate will be energized, rather than drained, by the activity of addressing questions in public forums and engaging in healthy debate with influential members of our business, political and not-for-profit communities.

Translating Strategies into Actionable Goals and Accomplishments

Balancing external and internal commitments will be a "way-of-life" for the individual in this role. United Way of Greater Rochester has policies, processes and supporting technology in place to execute goals, but improvements must be made. The successful candidate will be eager to first learn the current, then gather input from the team on policies, processes and technology that can be better-leveraged for efficiency and quality improvements. The new SDA will draw from past successes with change initiatives, empowering team members to "own" individual projects and be held accountable for results. Over time, the SDA will likely spend 60% or more of his/her time on external-facing activities, and 40% on internal goals and meetings – with an emphasis for that 40% to be accessible in the office to lead, manage, inspire, and mentor staff under management.



This opportunity should be of particular interest to accomplished, mission-driven fundraising leaders who have experienced internal conflict over which agencies are most in need of their assistance when considering new employment. There is no other role in this community where it is the SDA's job to support the efforts of over 75 partner agencies who in turn support the entire life-cycle of our neighbors in need, from infants to older adults. United Way of Greater Rochester convenes resources, volunteers, and ideas to help our neighbors gain an education, fight poverty, improve health and well-being, overcome challenges, and live full, active connected lives in our community. Your job will be to unite the community to solve problems.

CANDIDATE GOALS

Within the first six months, the successful candidate will:

- Meet with staff under management to learn existing roles, policies, procedures, and technology in place. Team with staff to prioritize policies, procedures, and technology in need of change.
- Meet with United Way of Greater Rochester's largest corporate and individual donors, as defined by Senior Leadership and staff under management.
- Meet with department leaders to understand the full life-cycle of an annual Community Fund campaign, including the measurement and reporting of partner agencies that provide services directly to members of the community.
- Meet with the leadership of partner agencies, instilling a sense of confidence that their organizations are understood and valued.
- Develop a plan to improve the data mining capabilities of CRM systems under management, moving from a spreadsheet environment to a database.
- Team with the COO to develop a strategic plan for achieving the next year's Community Fund goals.

CANDIDATE QUALIFICATIONS

The successful candidate will possess the following:

- A Baccalaureate Degree from an accredited college or university. Master's degree a plus.
- A minimum of seven years of leadership experience in fundraising; or consultative sales experience combined with NFP leadership experience (at management or board level).
- A record of accomplishment for meeting or exceeding sales or fundraising goals
- Knowledge of the Greater Rochester community, including agency partners and influential community members. Demonstrated comfort level meeting with agency executives, business executives and political figures.
- A natural habit for creating and maintaining up-to-date donor records and holding staff members accountable to do the same.
- Proven ability to lead, mentor and inspire teams and individual team members to greater levels of competency and success
- A sense of urgency and ability to adapt to unexpected changes posed by management, prospects, and external market forces, quickly re-focusing efforts to solve new challenges at hand

- Unquestioned professional and personal integrity
- An ability to work evenings and weekends as needed to accommodate meetings with busy executives and attend community events.
- The successful candidate must reside in the Greater Rochester, NY area or relocate to the area within 4 months of hire.

This description is not meant to be an all-inclusive list of duties and responsibilities, but constitutes a general definition of position scope. In support of the ADA, this job description lists only the responsibilities and qualifications deemed essential to the position.

HOW TO APPLY/MAKE INQUIRIES:

This retained search is being conducted exclusively by Patty Phillips of Clarity Recruiting and Career Management, Inc., for the United Way of Greater Rochester. Please contact Patty directly with a cover letter and resume directed to patty@clarityracm.com. All applicants and inquiries, regardless of how sourced, will be forwarded to her attention. In your cover letter, please explain the basis for your interest in the position, and highlight relevant experience for the role.