

# SURREY

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## POSITION DESCRIPTION

### DIRECTOR OF DEVELOPMENT

The primary function of the Director of Development is the advancement of the Mission and effective positioning of Surrey to the general and philanthropic community. In concert with the President/CEO, the Director of Development is responsible for the management and implementation of a Comprehensive Development Program including the \$15,000,000 Inspired Aging Campaign, annual giving activities, events, donor and prospect relations, planned giving, and other activities designed to build community engagement and secure philanthropic support.

The Director of Development reports directly to the President/CEO and works with the Board of Directors, Development Committee and volunteers involved in philanthropic activities. Direct reports include the Grants Manager and Development Associate. The Director of Development will represent Surrey in the community, working with key stakeholders, philanthropic and community leaders, groups, and organizations to build and sustain relationships integral to the support of current programs and long-term sustainability of the Mission.

#### SPECIFIC RESPONSIBILITIES

##### Management:

- **Development Program:** Advances the philanthropic position of Surrey through the effective management of a comprehensive scope of Development initiatives including annual giving activities; foundation and grants development; events, direct mail, and donor/prospect relations in compliance with short and long-range plans.
- **Major Gifts & Campaign:** Works directly with the President/CEO in relation to major gift development, planned giving, and other campaign activities.
- **Board & Committee Activities:** Works with Board and Committees members; attends meetings and provides reports, updates, and other information to engage support, and keep Board apprised of current activities and status toward goals.

##### Development Programs:

- **Plan Development:** Creates and implements an annual Development Plan to meet the immediate and long-term needs of Surrey; presents plan to President/CEO for review and approval, makes presentations and reports on its progress.
- **Campaign Support:** Works with the President/CEO to support the effective planning and implementation of campaign strategies and activities, including donor and prospect relations, recognition activities, gift and pledge management, donor listings, reporting functions and other activities leading to the successful achievement of goal.
- **Case Development:** Works with the President/CEO to identify funding priorities, assists in the creation of the funding plan, writes compelling and inspirational case statements based on same, and presents case as appropriate during cultivation and solicitation meetings.
- **Planned Giving:** Works in collaboration with the President/CEO, financial and legal advisors to market and manage estate gifts and planned giving opportunities including identification, research and

cultivation of prospects; development of solicitation strategy; participation in solicitation and donor recognition.

- **Foundation & Corporate Grants:** Working with the Grants Manager, oversees grant activities directed to local, state, and national foundations and granting agencies including research, proposal development, presentations, and reports as required; works in collaboration with the President/CEO in the effective cultivation and solicitation of major foundation and corporate donors.
- **Events:** Works with committees and volunteers to plan and execute events focused on increasing awareness and engagement of the general and philanthropic community, cultivation of prospects and donors and increased support for programs and services.
- **Prospect Research:** Oversees prospect development and research functions including the identification and maintenance of accurate and up-to-date prospect files for individuals, corporations, foundations, or groups who have the ability or inclination to support Surrey, especially at a major gift level.
- **Cultivation & Solicitation:** Identifies prospects, develops, and conducts cultivation activities for potential donors, and participates in gift solicitation activities as appropriate.
- **Cultivation Materials:** Works with the Marketing Department to prepare cultivation and solicitation materials including case statements, proposals, solicitation materials, and other collateral materials as needed.
- **Donor Relations:** Maintains an ongoing donor stewardship program; conducts personal visits, schedules luncheons and meetings, makes personal calls, produces correspondence, and other forms of donor communication.
- **Donor Recognition:** Manages the donor recognition program. Identifies recognition opportunities for various interest areas and levels of giving, ensures accurate and timely donor listings and recognition, and administers policies related to gift recognition.

#### Professional:

- **Community Representation:** Serves as a representative of Surrey in the community, participates in community events, makes presentations, seeks involvement in professional and civic organizations, and identifies opportunities to strengthen the presence of Surrey in the community.
- **Ethics & Professional Standards:** Maintains a professional demeanor in dress and behavior, treats people with respect & dignity, maintains all donor and prospect information in the strictest confidence.

### QUALIFICATIONS, SKILLS & ABILITIES

#### Core Competencies:

- A deep commitment to the Mission of Surrey Services and a passion for helping older adults “live with independence and dignity and continue as engaged members of the community.
- Proven knowledge and experience at the creation of a Comprehensive Development Plan and effective management and implementation of a full cadre of Development Programs.
- Direct operational experience in the management of development programs, including annual giving, major gifts, planned giving, donor relations/stewardship, corporate and foundation giving, and development operations.
- Effectiveness in the development and stewardship of relationships with donors, volunteers, prospects, and other key stakeholders, using traditional and innovative strategies to assure the achievement of goals.
- Ability to effectively communicate the Mission and articulate an inspiring Case for Support that motivates donors and prospects to heightened levels of engagement and support.
- Ability to lead and manage the Development team, bringing staff and volunteers together into a singular focused effort toward the achievement of goals.
- Excellent communication skills, both written and oral; ability to influence and engage a wide range of donors and build long-term relationships.

- Strong organizational and time management skills with exceptional attention to detail.
- The highest standards of professionalism in behavior and demeanor to reflect the mission and values of Surrey to the community.

#### **Attributes:**

- A person of character and integrity, able work effectively as a member of a team, and able to effectively live and represent the Mission and values of Surrey in the community.
- Highly driven and results-oriented; mature & professional in action & demeanor.
- An innovative thinker and creative generator of ideas, able to develop, implement and manage strategies that inspire others toward achieving goals.
- A strategic thinker with a strong work ethic for high quality performance and attention to detail.
- Dynamic interpersonal skills, including the capacity to relate on a highly personal level to a very wide variety of prospects, donors, and volunteers.

#### **Skills:**

- Microsoft Office suite /Raiser's Edge software/ Social Media

#### **REQUIREMENTS & CONDITIONS**

- Bachelor's Degree from an accredited college or university.
- Minimum of 3-5 years of experience with demonstrated achievements in the planning and management of a Comprehensive Development Programs including major gifts, direct mail, events, foundation and corporate giving, planned giving, social media, donor development and stewardship. Experience with a major campaign is a plus.
- Strong written and verbal skills are essential.
- Experience in leading a Team.