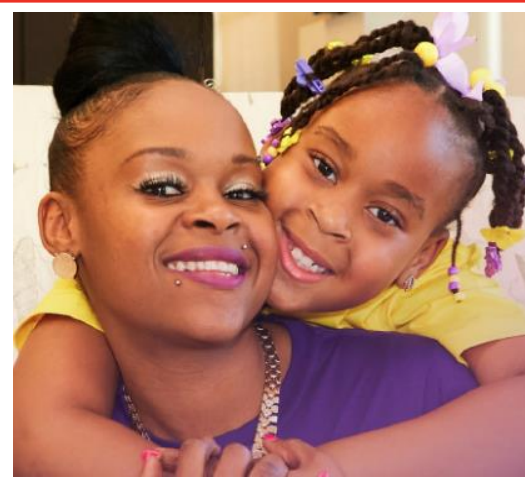




United Way Greater Toronto



Executive Brief Chief Philanthropy Officer





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FOR MORE INFORMATION

KCI (Ketchum Canada Inc.) has been retained to conduct this leadership search on behalf of United Way Greater Toronto. For more information about this opportunity, please contact Tara George, Partner / Lead, KCI Search + Talent by email at UWGT@kcitalent.com.

Interested candidates are invited to send a resume and letter of interest to the email address listed above by September 9, 2019. Please note that early candidate submission is encouraged, as the client will begin candidate meetings in mid-August.

As an employment equity employer United Way actively seeks Aboriginal peoples, visible minorities, women, people with disabilities, (including people with who have experienced mental health and substance use challenges), and additional diverse identities for our workforce.



Chief Philanthropy Officer United Way Greater Toronto

THE OPPORTUNITY

We are seeking a Chief Philanthropy Officer (CPO) to lead the strategy, team, and relationships that will drive capacity, growth and transformational impact, and help to evolve our fundraising campaigns. The CPO will have primary responsibility for long-term fundraising strategy and oversight of all individual and corporate giving, including transformational investments, major gifts, planned gifts, national corporate programs, events, stewardship and workplace campaigns, as well as our endowment, *The Tomorrow Fund*. The Chief Philanthropy Officer will also oversee Marketing functions, which consist of brand development, content and strategic marketing.

Reporting to the CEO, the Chief Philanthropy Officer will work closely with the Senior Executive Team to collaborate on fundraising programs, co-creation of philanthropic initiatives and develop donor engagement opportunities. As one of UWGT's most senior staff, CPO will also be instrumental in setting the organization's strategic direction.

A primary focus for the Chief Philanthropy Officer will be the development and implementation of strategic and business plans related to revenue growth to support UWGT's community impact strategies. This will be done in partnership with the Philanthropy and Marketing teams, which consists of three Directors and a total staff complement of approximately 75.

ABOUT THE UNITED WAY

United Way of Greater Toronto runs Canada's largest annual fundraising campaign in support of a vital network of community services across the region. As the largest non-governmental supporter of social services in the region, we are dedicated to creating the opportunities people need to improve their lives and build a better future.

United Way works closely with community partners to address immediate and systemic challenges in the community it serves. Coupled with ground-breaking research, these partnerships enable the United Way to identify gaps and responsibly mobilize volunteer and financial resources to deliver direct, positive, lasting impact – right here where we live, work, and raise our families.



In 2018, United Way of Greater Toronto raised over \$110 million to invest in programs, which makes us one of the most significant philanthropic campaigns in Canada, and the largest United Way in the world.

Volunteer leadership is at the heart of all that we do:

- A volunteer Board of Trustees governs all United Way decision-making. The Board shapes the strategic vision and plan, oversees fiscal health and sustainability and monitors risk, mitigation strategies and performance.
- The Strategic Resource Development Committee helps ensure the long-term sustainability of United Way Greater Toronto's resource development program through the review of new and emerging fundraising, marketing, and donor engagement strategy options developed by the management team; reviews governance issues related to identifying and assessing risk in adopting new strategies in these areas; and makes recommendations to the Board of Trustees on new resource development strategies.
- The Campaign Cabinet and Major Giving Cabinet are the driving force behind the annual campaign. These leaders encourage colleagues, peers, and their organizations to participate in the campaign. The Campaign Cabinet's effort ultimately involves 20,000 volunteers, and reaches into workplaces large and small across the region.
- The Community Impact Committee of the Board oversees implementation of the strategic plan, research and public policy, advocacy and community partnerships and initiatives, fund distribution and organizational development support.

Like all charities, United Way of Greater Toronto is facing a changing environment when it comes to fundraising, and we are working hard to adapt and respond to the resulting challenges and opportunities. Building on our historic areas of strength, we are pushing ourselves to find the right balance between focusing on and investing in the refinement of our current fundraising model with the development of new innovations and programming. We have an openness to change and to new ideas, new perspectives, new skills and new ways of doing things. We know our path forward.

Over the past number of years, the United Way of Greater Toronto has revised our investment and partnership strategy, undertaken two strategic mergers, redefined our brand, and increased our digital presence and abilities. We have recently realigned our organizational structure to ensure that we focus on what matters most, where we can have the most impact - and to ensure that we have appropriate resources and internal alignment to do so. We've also undertaken a number of refinements to our fundraising program, including the development of a new third party platform by which to undertake our workplace campaign. Additionally, we've begun to develop multi-year, co-created partnerships with a number of major corporate and individual donors in the advancement of both their philanthropic and our community investment agendas.

Moving forward, we are committed to continuing to grow our capacity and ability to engage and partner with leading philanthropists, foundations, and corporations who want to make a transformational impact on our communities. The recent \$15 million gift from The Slaight Family Foundation is an excellent indicator of this commitment. The largest individual gift in United Way Greater Toronto history, the Allan Slaight Seniors Fund will connect vulnerable seniors with community support to help them remain in their own homes and continue to be vital, active participants in our neighbourhoods. A first of its kind, the fund bridges the gap between the healthcare system and families by connecting seniors to United Way's network of community agencies.



We look forward to developing many more innovative and impactful partnerships, while at the same time maintaining and evolving our broader community campaign so that all people in the GTA can contribute to creating the opportunities that people need to improve their lives and build a better future.

LOCAL LOVE

We love where we live. Vibrant communities. Strong people. World-leading quality of life. Despite this abundance and prosperity, poverty is hurting us.



Thanks to our 140,000 donors and 20,000+ volunteers, we're helping to change that. Our refreshed investment model—a dynamic network of agencies bolstered by partnerships with 62 anchor agencies that target the places and people hit hardest by growing income inequality—is having real impact.

In 2015 we merged with United Way York Region, and in 2018 United Way of Peel Region. We've just completed our first year as United Way Greater Toronto, working with communities across Peel,

Toronto and York Region. Our integrated perspective is enabling an amplified voice on the common problems we face in the GTA, while strong ties to individual communities help us understand how challenges manifest themselves differently. With knowledge and experience from our work across communities, we're bringing the greatest of our successes and adapting them to respond to issues in a local way. From homelessness prevention, to workplace development for the next generation, to new economic opportunities in neighbourhoods often left behind, we're putting your support—your local love—into action.

People give to and volunteer for the United Way because they feel confident that their investment is making a [direct and lasting impact](#). At United Way, we work every day to cultivate that trust. We pride ourselves on being responsible, transparent stewards of the community's resources and your generous support. Our ethical-fundraising and financial-accountability practices—from our [policies](#) to [our operating standards and accreditation](#)—speak for themselves.

OUR VALUES

At United Way, our mission is to meet urgent human needs and improve social conditions by mobilizing the community's volunteer and financial resources in a common cause of caring. Here are the core values that guide everything we do:

- **Community** - Working collaboratively with the community is at the heart of our work. Because, when people come together, we can accomplish so much more than we ever could alone.
- **Integrity and accountability** - We deeply value the trust that the community has placed in us, and we work tirelessly to ensure that this trust will always be well founded.
- **Diversity and inclusiveness** - While reflecting the community we serve, we embrace different abilities, perspectives and experiences, and we are committed to the promotion of equity—welcoming, celebrating and valuing the contributions of all. (Read our internal [2018 Diversity and Inclusion Progress Report](#) and [UWGT's Inclusion Charter](#) for more information.)
- **Excellence and innovation** - Devoted to excellence and innovation, we strive to go beyond expectations, always seeking new and better ways to achieve our shared goals.

- **Service** - We are motivated by a strong commitment to service—to our donors, our neighbours and our region. Our achievements are defined by the collective success of the communities we serve.

ADDITIONAL INFO

- [Annual Report 2018-2019](#)
- [Lives Changed / Local Love Stories](#)
- [Community Blog](#)
- [Partner Agencies](#)
- [News Releases](#)
- [Supporters](#)
- [Local Leaders List](#)
- [Research Reports](#)
- [United Way GTA LinkedIn](#)
- [United Way GTA Instagram](#)
- [United Way GTA Twitter](#)
- [United Way GTA Events](#)
- KCI Podcast Episode to be added

KEY RESPONSIBILITIES

The Chief Philanthropy Officer will have responsibility for the following:

Strategic Leadership

- Provide leadership in the development of new and ongoing fundraising approaches, strategies and tactics to achieve the long-term revenue growth objectives of the organization.
- Provide leadership and strategic direction to the Philanthropy (Individual Donor Relations, Corporate Donor Relations, Donor Engagement and Stewardship) and Content Marketing functions.
- Ensure the effective integration of annual corporate and individual fundraising programs with major and principal giving, aligned giving, targeted gifts and the endowment.
- Provide leadership to UWGT's integration with regional, national and global fundraising strategies and program implementation and represent UWGT on national and global United Way philanthropy and marketing initiatives.

Relationship & Revenue Leadership

- Serve as the primary driver of transformational donor relationship development.
- Participate in major individual and corporate relationship development in order to strengthen long-term relationships and partnerships, and to drive increased donations and voluntarism.
- Provide staff support for the Strategic Resource Development Committee of the Board.
- Provide oversight to the development of effective marketing-communication strategies and channels related to all donor stakeholder groups.

Staff & Volunteer Leadership

- Provide oversight to the senior staff team, comprised of three Director-level staff, ensuring effective training, management, evaluation, and support for professional development and job satisfaction.
- Provide proactive coaching, mentoring, and goal-setting to the senior staff team, and to their respective teams as required.
- Ensure capable management succession.
- Oversee the recruitment and effective engagement of UWGT's Campaign and Major Giving Cabinets and their Chairs.



Operational Leadership

- Develop and monitor program plans aligned with departmental plans to meet annual and long-term strategic organizational objectives.
- Support the senior team in developing an annual budget and business plans to achieve the program objectives, assessing progress, and recommending/implementing appropriate changes as needed.
- Identify and manage risks through appropriate risk mitigation strategies.



REQUIRED QUALIFICATIONS & COMPETENCIES

- Passion for the mission and a desire to work in a values-based organization
- Significant progressive management experience and proven experience in a senior leadership role with a primary responsibility for fundraising and donor relationship development
- Track record of personally cultivating and closing transformational gifts, and successfully managing relationships with major donors and senior volunteers
- Extensive knowledge of fundraising trends, methods and principles and significant experience leading large-scale fundraising programs, including major, planned, and annual activities
- Deep knowledge of donor relationship management and the philanthropic environment in the GTA
- Demonstrated capacity to drive growth in revenue lines
- Sound knowledge of marketing and engagement strategies related to donors; experience leading or overseeing strategic marketing is also strongly preferred, but is not mandatory
- Reputation for high degree of integrity and trustworthiness
- Strong influencing skills, openness to new ideas, patience and persistence – able to build consensus in a complex, multi-stakeholder environment
- Excellent relationship-building and interpersonal skills to work effectively with senior volunteers on governance committees and external partnerships
- Excellent people leader and manager, with the ability to empower and mentor a team with a variety of portfolios
- Strategic, big picture thinker with a superior ability to develop pragmatic solutions and efficient processes
- Solid overall business acumen and analytical skills
- High energy, enthusiasm and a demonstrated ability to work effectively under pressure
- Highly organized and accurate with excellent attention to detail
- Ability and willingness to be hands-on and get the work done
- Comfortable with a broad constituency – donors, business, labour and government leaders, social services agencies, foundations, youth, established and emerging diverse communities
- Creative, flexible and able to handle complexity and ambiguity
- Results-driven, hard-working and always focused on continuous improvement
- Relevant post-secondary education or equivalent

BIOGRAPHY: DANIELE ZANOTTI – PRESIDENT & CEO, UNITED WAY GREATER TORONTO



Daniele Zanotti was named President & CEO of United Way in June 2016.

With more than 20 years of experience in the public and non-profit sectors, he has earned a reputation as an accomplished, strategic, and energetic leader. Daniele served as CEO of United Way York Region from 2007 to 2015. During that time he led an evolution that transformed the charity from federated fundraiser into a convener, mobilizer, and agent of community change. Under his guidance, the charity launched new initiatives to foster community dialogue; invested in more targeted and effective ways; and brought new social services to the communities most in need.

In 2015, Daniele was the catalyst of an historic merger between United Ways in York Region and Toronto. He committed himself and his organization to a broader alliance for community change — and established a new regional organization that is now better positioned than ever before to tackle issues on both sides of Steeles Avenue.

Following the merger — as the new head of resource development and captain of the first-ever United Way Toronto & York Region fundraising effort — Daniele led the 2015 campaign to a record-breaking achievement: \$100-million for United Way's agencies, programs, and initiatives. In this capacity he also played a fundamental role in driving greater alignment between strategies for youth, poverty reduction, and community investment across Toronto and York Region.

Before joining United Way, Daniele served organizations like the Rexdale Community Health Centre; the Regional Municipality of York; Family Day Care Services; and Villa Charities Foundation. He is deeply involved in the community outside of his professional career. Daniele has been a member of the steering committee for CivicAction, and has volunteered on the boards of the Toronto Region Immigrant Employment Council (TRIEC); the Human Services Planning Board of York Region; and the Vaughan Community Health Centre.

Daniele has a Masters in Social Work from the University of Toronto and Bachelor's Degree from York University. He lives in Vaughan with his wife and 2 children.

[Hear from our Daniele on how United Way of Greater Toronto and our donors and volunteers helped to tackle local poverty and #UNIGNORABLE issues in 2018-2019.](#)

UNITED WAY GREATER TORONTO BOARD OF TRUSTEES

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Patricia O'Campo, Vice Chair, Community
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The Regional Municipality of York

Mohammed Hashim, Member
Toronto & York Region Labour Council

Mariam Hashmi, Member
RBC

Wayne Halenda, Member
Independent Consultant

Nancy McConnell, Member
Google

Kwame McKenzie, Member
The Wellesley Institute; Centre for Addiction &
Mental Health

James Meadows, Member
Manitou Investment Management Ltd.

Andrew Robertson, Member
Peel region Labour Council

Jane Rowe, Member
Ontario Teachers' Pension Plan

Elaine Walsh, Member
Hill House Hospice (Retired)

Mark Wiseman, Member
Blackrock, Inc.