

# Ladder Up

## Director of Development

***Ladder Up seeks an experienced Development professional, who is a creative and strategic thinker to segment, approach, qualify, solicit and honor individual, business and foundation donor/investors to fund services that provide hard working people with free financial resources to secure the opportunities they need to move up the economic ladder.***

Robert Burke founded Ladder Up in 1994 to help secure unclaimed tax credits for people of underserved Chicago communities. Year One, Burke recruited 90 colleagues with finance skills to prepare tax returns at no cost. This returned over \$150,000 in tax refunds to 120 families. Fast forward to today, the organization has served 775,000 clients, engaged over 35k volunteers, filed 635,000 tax returns, returned over \$1.42 billion to families, and secured an estimated \$375 million in financial aid awards for students.

Over the years, Ladder Up has evolved to deliver other kinds of services to hard working people trying to move up the economic ladder. Today the organization offers a suite of discrete programs, and every dollar invested in Ladder Up has a direct impact on its clients.

Services include:

- **Tax Assistance Program (TAP):** Offers Free tax walk-in service for families earning up to \$67,000 per year and individuals earning up to \$35,000. Services are provided at 12 Tax Sites across Chicagoland. The service consists of fee Tax preparation for Federal and State income tax returns.
- **Tax Clinic - Free Legal Help:** Serves low-income individuals and families who have a controversy with the IRS/IDOR and who would like to dispute their liability or negotiate an affordable payment arrangement.
- **Financial Aid for College:** Provides students with any age or parents with multiple workshops on College finances 101, Financial Aid Application Workshop, Financial Aid Application Completion Program, Understanding Student Loans Workshop and others.
- **Financial Education/Literacy:** Helps clients build a lasting foundation for self-sufficiency by working with them to secure financial aid for higher education and to gain skills needed to make sound financial choices. This program is founded on the belief that developing financial practices is a vital part of the journey to financial freedom.

Joining Robert Burke at Ladder Up is newly hired Executive Director Sharifa Haye. Ms. Haye has a background in Digital Transformation and financially focused professional services in global and boutique consulting organizations. Her job is to increase the number of people served, expand the organization to do so, and to assure financial sustainability as the organization grows. A key part of this is the focus on scaling Ladder Up through digital channels to serve more clients locally and nationally and developing an innovative approach to do so.

Ladder Up has an annual operating budget of \$1.6M, employs a staff of 10, over 890 volunteers, ramps up with Seasonal staff during tax season, and has a 5 member Board of Directors as well as an Advisory Board and an Associates Board.

***The Director of Development's key responsibility is to develop the broader strategy for short-term and long-term fundraising and relationships, and to personally solicit and orchestrate team solicitation of capacity-building funds from individual, business and foundation donors to scale the organization so that it can serve more families.***

## **BASIC FUNCTION**

Reporting to the Executive Director and working closely as a partner to the Executive Director, the Founder, Board Members and other staff, the Director of Development will be a roll-up-your-sleeves self-starter leader who will identify and engage new donors. The Director of Development will develop a major gift, business sponsorship and foundation grant pipeline that is defined by donor and program, and will shape fundraising events, marketing collateral, and mass and individual outreach. The Director of Development will create a robust donor moves management fundraising calendar to ensure there is consistent outreach and awareness-building activities that tie back to results.

The Director of Development will be a hands-on and deeply involved fundraiser. They will leverage Ladder Up's brand and outcomes for institutional advancement; spend time in the community developing strategically important relationships; and will personally meet with and solicit donors. As the development function scales up, the Director of Development will hire a Development Manager, and deepen the organization's culture of philanthropy. The overarching objective of the Director of Development is to have all staff and Board members view all activities, programs, services, events, contacts and relationships as opportunities to market the organization and solicit donations.

This is a hardworking environment that focuses on results achieved through innovative thinking, initiative, data analysis, focused action and open communication. Key factors contributing to this person's success will be an ability to develop deep, trusting relationships with the Founder, Executive Director, Members of the Board of Directors, Advisory Board, Associates Board and the team, and the ability to collaborate productively with peers on the Executive Team.

## **RESPONSIBILITIES**

In the first three months, the Director of Development's immediate priorities are to:

- Thoroughly understand Ladder Up – the history, culture, programs, personalities, constituencies, and impact; its base of financial support; and the short and long-term funding requirements for the organization.
- Immediately assess the current status of ongoing fundraising efforts and provide support for those efforts as needed; assume a hands-on role in the identification, cultivation, and solicitation of major gift, foundation grants and business funding opportunities.
- Align with the Executive Director on current fiscal year development plan inclusive of fundraising goals and donor outreach that is measurable
- Develop a strategic plan and roadmap for Development that aligns with the vision and mission of Ladder Up and includes tactical next steps for immediate execution, short-term execution (1st 90 days), fiscal year end, and long-term (beyond 1 year to 5 years).

- Develop strong relationships with the CEO, Executive Director, Board and Advisory and Associates Boards; meet with key funders and others critical to individual and institutional fundraising efforts.

Ongoing responsibilities include:

- Review the current fundraising support infrastructure to ensure that the organization can respond quickly, effectively, creatively and contextually to long-term financial requirements, short-term operating needs and donor interests and opportunities.
- Manage and personally engage in solicitation and stewardship activities in collaboration with the ED, Board, and others; provide leadership and coaching to assist others in their fundraising success.
- Develop a pipeline of new individual and institutional donors; ensure cultivation, solicitation, and stewardship activities follow a strong, transparent process.
- Understand Ladder Up initiatives and develop stories that highlight the benefits of providing free financial resources like tax support and financial literacy to working families.
- Expand the public's awareness of Ladder Up, its mission, values, outcomes, and need for philanthropic support through consistent and effective communications in all outwardly facing materials, including direct marketing, website, social media, presentations, and impact reports.
- Plan and execute special events that highlight Ladder Up and the importance of additional community support.
- Manage the activities of the Associate and Advisory Boards, including organizing meetings, guiding members to carry out the fundraising action plans established for all events and identifying, recruiting, and training new volunteer leaders.

### **PREFERRED EXPERIENCE**

The successful candidate will be passionate about actionable programs that break the cycle of poverty in our community, and have combinations of the following experience and qualities:

- A mission-driven individual with a belief in and commitment to the mission of Ladder Up; a record of personal success in raising major gifts from individuals, businesses, foundations, corporations and the public sector; a verified track record of meeting or exceeding measurable fundraising goals.
- Broad-based knowledge of various development activities including annual campaign, major gift, proposal and grant development, planned giving, capital campaign, sponsorship, growing endowments, event planning and management, leveraging fundraising databases and support systems for donor segmentation, research and volunteer management.
- Proven ability to build and maintain relationships with major donors, corporate partners, and community stakeholders, demonstrating exceptional networking and interpersonal skills.
- Proficiency in utilizing technology, CRM systems, and data analytics to drive fundraising efforts, optimize donor engagement, and implement data-driven decision-making processes.

- An exceptional communicator verbally and in writing; able to build enthusiasm for Ladder Up, its programs, and impact; adept at writing proposals, solicitation letters, donor correspondence, and other kinds of material for publication.
- A good listener and strategist; comfortable receiving input from many sources, and able to analyze and formulate disparate information into a sound, well-organized plan.
- Intrepid yet tactful; determined yet respectful of the concerns of others; someone with the flexibility and creativity needed to find alternative ways to reach funding objectives when barriers arise; a skilled negotiator who does not drive themselves or others into a corner.
- A hard worker with a high energy level; a “doer” with a willingness to work hands-on in developing and executing a variety of development activities.
- Emotionally mature with a very good sense of humor and the flexibility and sensitivity to work with diverse personalities and situations.
- Strong network in the Chicagoland area, beyond the Chicagoland area is a plus.

The compensation range for this position is \$140,000 - \$175,000. The position requires being on site, with flexibility to attend donor and other meetings and events on other workdays, weekends and evenings as needed.

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