

## UNITED WAY OF THE MIDLANDS

### POSITION DESCRIPTION

Date established: 01/28/2021

Last Revised: 04/24/2024

**Position Title:** Director of Individual Philanthropy

**Department:** Resource Development

**Supervisor:** Senior Director of Individual Giving, Resource Development

**Position Status:** Full Time Regular, Subject to an Annual Review

**Job Classification:** Exempt

In compliance with the Fair Labor Standards Act, this position is classified as an Exempt position and the employee is not eligible for overtime. Some evening and weekend hours may be required.

### POSITION SUMMARY

The Philanthropy Officer plays an integral role in growing a culture of individual philanthropy that is respectful and transparent to donors while meeting UWM's fundraising needs. This position is responsible for designing and implementing an annual giving plan, along with supporting a major gifts program, to meet the position revenue goals. Reporting to the Senior Director of Individual Giving in Resource Development, the Philanthropy Officer is responsible for research, strategy, solicitation, and stewardship of annual gifts from a portfolio of leadership donors in the Palmetto Society. Palmetto Society are donors giving \$1,000 to \$9,999 annually. This position will work with the Director of Women In Philanthropy and Young Leaders Society to identify individual donors who have capacity to raise their giving. Successfully develops new and varied resources from donors, achieving specified benchmarks and improving relationships. This position focuses on relationship-building strategies that create consistent and positive experiences for donors. This position is responsible for stewardship process for gifts from donors giving \$1,000 to \$9,999.

### ESSENTIAL DUTIES & RESPONSIBILITIES

#### Workplace Campaigns

- Work closely with campaign managers to identify donors who are near or at the Palmetto Society level to establish a relationship with them in efforts to raise their giving.
- Develop key relationships with leadership donors.
- Recruit and retain Palmetto Society donors within workplace campaigns.
- Perform year-round account research to identify new prospects and stay current on industry trends.

#### Donor Engagement

- Manage the Palmetto Society Cabinet which is responsible for peer-to-peer growth of the Palmetto Society through their own community connections. Palmetto Society are those donors giving \$1,000 to \$9,999 annually.

- Work closely with volunteers, and internal departments to set and accomplish annual and long-term goals to attract and sustain resources and engage and recognize donors year-round.
- Coordinating engagement and stewardship events for leadership donors.
- Manage the acknowledgement process for donors giving \$1,000 to \$9,999.
- Collaborate and work with Senior Director of Individual Giving, on events, strategies for individual giving and work as a partner in accomplishing individual giving revenue goals for UWM.
- Collaborate with team members on special projects involving workplace campaigns and affinity groups.
- Utilize StratusLIVE (CRM) to record visits and communications, as well as gather and maintain accurate donor information.
- Develop and implement leadership giving growth strategies.
- Collaborate with the Community Impact staff and partners to understand and effectively articulate how leadership and affinity group donor dollars support UWM's work in the community.
- All other duties as assigned.

#### Leadership Giving (\$1,000 - \$9,999)

- Assist with creation and implementation of strategic plan for leadership giving, including prospecting, communications, cultivation, retention, moves management, and stewardship.
- Identify prospective leadership donors inside and outside workplace settings by working closely with UWM's Resource Development staff.
- Meet an annual individual giving revenue goal from assigned portfolio.
- Conduct at least 50 unique in person meetings a year and record the results/information in StratusLIVE.
- Work with Senior Director of Individual Giving to identify Palmetto Society members who have the capacity and interest in joining the Tocqueville Society or Tocqueville Step Up Program. Tocqueville Society are donors who give \$10,000 or more annually to United Way.
- Work with the Senior Director of Individual Giving to identify Palmetto Society donors who are retired or are retiring from the workplace, that would like to stay engaged with United Way and have an interest in joining the Tocqueville Sustainers Legacy Program.
- Promote leadership giving and advance donors to higher levels. Develop, in collaboration with the Marketing and Communications team, a compelling case for support.
- Support the activities of the Palmetto Societies and affinity groups.
- Conduct research and analyze and manage data and demographic information relevant to this donor segment.
- Research, identify, analyze, and communicate key donor trends, results, and opportunities to ensure continued growth in donors in revenues.
- Benchmark and measure retention and donor churn.
- Develop donor stewardship through engagement in personal visits, events, volunteerism, and recognition of contributions.

### **CORE COMPETENCIES**

- **Effective Communication:** Work effectively with volunteers and staff. Must maintain confidential information. Excellent interpersonal and relationship-building and written and verbal communication skills.
- **Strategic Relationship Management:** Work to understand, relate to, and engage constituents to improve their experience with UWM's brand and generate more significant relationships with them. Continually builds and expands the network of donors.

- Customer Oriented: Listens to the needs, interests, and passions of the donor with an eye towards connecting them with UWM's work in the community. Identifies, engages with, adapts to, and influences various types of individuals and organizations.
- Innovation and Creativity: Remain open to new ways of doing business. Recognizes and capitalizes on emerging opportunities. Flexible, adaptable, and open to change. Committed to continuous learning.
- Action Oriented/Results-driven: Demonstrate strong drive to achieve meaningful results and able to follow through on commitments. Work on concurrent assignments and meet deadlines.
- Cultural Competency: Able to understand, communicate, and interact effectively with people across cultures.

## **REQUIRED & PREFERRED QUALIFICATIONS**

### **Required**

- Two years' experience in annual fund fundraising with demonstrated results in meeting goals in past roles.
- Goal-oriented, self-starter and ability to be strategic in fundraising strategies.
- Knowledge of development principles, fundraising techniques and ethics, including moves management donor strategies.
- Proven project management skills, including the ability to balance multiple projects in varying degrees of implementation.
- Demonstrated ability with Microsoft Office (Word, Excel, PowerPoint), donor databases (for example StratusLIVE, Salesforce, or Wealth Engine).
- Ability to travel throughout the area we serve.
- Bachelor's degree required.

## **SUPERVISOR AND/OR CONTACT INFORMATION**

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