



United Way of the Lowcountry, Inc.

**Job Title:** Philanthropy Specialist  
**Department:** Philanthropy  
**Reports to:** Director of Philanthropy  
**Status:** Exempt, Full-Time  
**Date:** 7/10/23

### **Position Summary**

This position is responsible for the implementation of the Annual Campaign Plan as set by the Director of Philanthropy and the President/CEO. Primary duties include implementation of the Annual Fundraising Campaign for northern Beaufort County, donor retention, and new donor cultivation and acquisition for both individuals and corporations. Carrying out work assignments in a timely manner, meeting all deadlines, and/or exceeding all philanthropy goals. The Philanthropy Specialist will also recruit and work with a volunteer fundraising team and serve in the role of support staff for that team.

### **Primary Responsibilities:**

#### **Philanthropy and Donor Stewardship**

- Primary responsibility is to maintain and grow existing donor funds, and to cultivate and acquire new donor funds by contacting donors and prospects personally through phone calls, face-to-face, and group presentations.
- Implement the Annual Campaign Plan as developed by the Director of Philanthropy and the President/CEO, carrying out work assignments and meeting all directed deadlines for fundraising initiatives including: the Annual Campaign, grants, special initiatives and events.
- Call reports to be completed and submitted to the Director of Philanthropy.
- Build in the mission of the organization in all communications, both written and verbal, and with volunteers and the public.
- Work closely with the Director of Marketing & Communications on all collaterals and written materials. Any Communications must be signed off on prior to distribution.
- Participate in the Philanthropy Team by attending all team meetings as called by the Director of Philanthropy, working together to ensure the success of all fundraising strategies, providing critical input, support, and information.
- Participate in the weekly Call Report conference calls as set by the Director. Be prepared to give call report updates and summary reports showing progress-to-goal and probability percentages on all pending accounts.

- Update Business Services with account information, notes, new accounts, and prospect management data.

### **CRM and Database Management**

- Learn and utilize the Charity Proud CRM system for prospect management and reporting.
- Commit to ongoing training as offered by United Way of the Lowcountry.

### **Volunteer Services and Recruitment**

- Recruit and support leadership and cabinet volunteers for the Annual Campaign and other initiatives as requested by the Director of Philanthropy.
- Facilitate meetings, and provide the volunteers with timely reports, information, and collaterals so they are successful in their fundraising efforts. Volunteers are instrumental in logistical support of the annual campaign such as mailings, delivery of campaign materials, cultivating industry and residential structures, speaking engagements, private fundraising parties, and with donor relationship cultivation and building.
- Organize and implement appropriate volunteer recognitions, post-event celebrations, including donor acknowledgements.

### **Special Initiatives and Grants**

- Help coordinate and participate in monthly meetings for the Philanthropy Team such as: Regional Cabinet Meetings and Champion Events, providing reports as needed/required, and providing meeting summaries with action items clearly outlined.
- Help coordinate and produce special events such as the UW Golf Outing, de Tocqueville Society private parties, and Champions Events. Work with the Accounting Department to keep net ratio expenses low and profits at a maximum. All expenses must be pre-approved.
- Support and participate in all United Way of the Lowcountry events such as the Annual Meeting, Golf Tournament, and the Power of the Purse.
- Participate in community networking, as planned and approved by your supervisor, provided by local groups, organizations or through community events.

### **Environment:**

The employee is in a non-confined office-type setting in which he or she is free to move about at will. In addition, the employee will travel via personal vehicle to client sites, workplace and special events, etc.

### **Physical Activity:**

In the course of performing this work, the employee:

- Will spend substantial time standing, sitting, speaking and listening.
- Must regularly lift and/or move up to 20 pounds and occasionally lift and/or move up to 50 pounds.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the job.

**Equipment and Software Operation:**

The incumbent in this position may operate the following equipment:

- Computer, printer and related equipment
- Audio-visual equipment
- Microsoft Office

**Key Competencies:**

- Five or more years working in the nonprofit industry in fund development.
- Solid background in fundraising and sales.
- Donor retention, growth, cultivation and acquisition experience.
- Strong relationship building skills.
- Demonstrated analytical decision-making skills.
- High attention to detail and ability to multi-task.
- Excellent time and project management skills.
- Hands-on volunteer recruitment. Ability to engage and inspire high level volunteers.
- Possess a driven, high energy, positive attitude.
- Ability to maintain a professional demeanor.
- Ability to adjust to various audiences.
- Team player who can effectively work and interact with staff, volunteers, and the public in a positive, supportive and friendly manner.
- Excellent written and verbal communication skills, presentation skills and speaking skills.
- Excellent computer and technical skills

**Other Requirements:**

- Valid South Carolina driver's license, proof of auto insurance coverage, daily access to a vehicle
- Ability to work hours outside of 8:30 am - 5:00 pm workday and to work occasional weekends and weekly evening events.
- Professional demeanor and appearance required, choosing the correct attire to represent the United Way of the Lowcountry, Inc. in conservative environments where professional appearance and dress is mandatory.
- Donor information is confidential, and you are required to always maintain that confidentiality at all times.

**UNITED WAY CORE COMPETENCIES FOR ALL STAFF**

- Mission-Focused: Catalyze others' commitment to mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- Relationship-Oriented: Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- Collaborator: understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- Results-Driven: Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- Brand Steward: Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

**Acknowledgement:**

I have received a copy of this position description. I understand, I may be asked to perform responsibilities and duties not listed in the description and management may change the description at any time, according to United Way of the Lowcountry's needs.

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| Signed: | Date: |
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