

Job Title: Philanthropy Associate
Department: Philanthropy
Reports to: Director of Philanthropy
Status: Exempt, Full-Time



ABOUT US

United Way of the Lowcountry unites the community to identify and solve our most critical issues. We are dedicated to improving people's lives and creating community-level change. Our work includes leading cross-sector collaborations, advocating for public policy changes and investing in programs that create opportunities for members of our community to achieve self-sufficiency. United Way of the Lowcountry currently partners with corporate, foundation, individual, and government funders to address the community's most pressing needs and drive sustainable results. In Beaufort and Jasper counties, we're working to create a brighter future for all. We do this in two ways: by providing essential services that meet the immediate needs of our most vulnerable residents and by investing strategically in education and economic mobility programs.

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 Associate will also recruit and work with a volunteer fundraising team and serve in the role of support staff for that team.

PRIMARY DUTIES AND RESPONSIBILITIES:

1. 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.
- Utilize 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 collateral and written materials. Any communications must be signed off on prior to distribution.
- Participate with 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.

2. 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.

3. 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 collateral 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.

4. 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, Power of the Purse, and Champions Events. Work with the Finance Department to keep net ratio expenses low and profits at a maximum. All expenses must be pre-approved.
- Participate in community networking opportunities provided by local groups, organizations or through community events.

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.
- Proficient in Microsoft Office Suite

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.
- Confidentiality of donor information is critical and must be maintained 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 motivation.
- **Relationship-Oriented:** Understands that people come before process and are 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.

BENEFITS

- Employer-subsidized healthcare plan.
- Employer-paid group dental, vision, and life insurance for employee.
- Other voluntary insurance plans are available.
- 401(k) retirement plan with employer contribution.
- Paid holidays, vacation, and sick leave time.
- Four-day work week from Memorial Day – Labor Day.

United Way of the Lowcountry is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, disability, age, sexual orientation, gender identity, national origin, veteran status, or genetic information. United Way of the Lowcountry is committed to the full inclusion of all qualified individuals. As part of this commitment, UWLC will ensure that persons with disabilities are provided reasonable accommodations if reasonable accommodation is needed to participate in the job application, interview process, or to perform essential job functions, and/or to receive other benefits and privileges of employment.

United Way of the Lowcountry | 1277 Ribaut Rd, Beaufort, SC 29901 | www.uwlowcountry.org