



**Position Title: Major & Planned Gifts Officer**  
**Reports to: Director of Development**  
**Date: Jun 8, 2018**

**Mission**

United Way of Collier County works to advance the common good by investing in the building blocks of a good quality of life: education, income, health and safety-net services.

**Overview**

The United Way of Collier County (UWCC) seeks a Major & Planned Gifts Officer to develop and build relationships in the community to address the human service needs of the community through our organization. Focus on fundraising for both annual and Endowment campaigns from individuals who can make gifts of \$50,000 or more.

The ideal candidate is someone who can look for ways to utilize unique strengths of a diverse workforce to accomplish project goals. Seeks out broader scope of knowledge. Independently manages multiple tasks with diverse objectives; sets priorities and determines resource requirements; establishes due date based on management priorities. Plays a significant role in success of team. Consistently offers assistance or takes lead with tasks. Takes personal responsibility for helping team achieve results.

Responsibilities include:

- Manage relationships with approximately 100-125 prospective and current donors that can make major/planned gifts of \$50,000 or more. Identify, qualify, cultivate, solicit and steward same.
- Participate in all aspects of the gift cycle:
  - Initiate contacts with potential leadership and major gift donors
  - Develop appropriate cultivation strategies for them, including working with volunteers
  - Move potential donors in an appropriate and timely fashion toward solicitation and closure
  - Make solicitations when appropriate
  - Maintain stewardship contacts with donors; adhere to the highest ethical standards; demonstrate empathetic disposition, and perseverance; reflect optimistic and positive attitude, and convey sensitivity to needs of the donors
- Participate in 20 donor meetings a month. With at least two solicitations of a major gift a month. Goal to close \$1,500,000 in major and planned gifts in a year.

- Work collaboratively with and in support of volunteers, other development staff, and other United Way staff to achieve the needs of the prospects.
- Participate in prospect management meetings to ensure coordination of cultivation, solicitation, and stewardship activities.
- Knowledge of all charitable gift planning vehicles, including how to determine the appropriate vehicles for specific prospects.
- Ability to gauge when the donor would be open to a blended gift comprised of a major gift and a planned gift to maximize the potential of the donor to give.
- Attend United Way events as well as outside events for United Way representation, networking etc.

### **Key Competencies**

- Attention to Detail
- Analytical Problem Solver
- Effective Communicator
- Interpersonal Skills
- Time Management/Multitasking Abilities
- Relationship Management
- Highly proficient in all Microsoft Office products
- Highly proficient in Raiser's Edge

### **Soft Skills**

- Committed to excellence and the mission of United Way
- Exhibits a passion for serving people – Customer Service Focus
- Public Speaking
- Sales ability
- Excellent writing, interpersonal, verbal and negotiation skills
- Seeks creative and innovative solutions
- Exhibits high personal standards of integrity, honesty and character
- Demonstrates high level of energy
- Spanish language is not a requirement, but helpful
- Anticipates and plans ahead while seizing immediate opportunities that surface
- Professional dress and approach

### **Job Requirements**

- Bachelor's degree required; Advanced degree preferred
- Experience in major gifts and planned gifts with a track record of closing major gifts in human services area
- Excellent time management skills and ability to multi-task and prioritize work
- Attention to detail and problem solving skills
- Highly organized with the ability to work independently as well as part of a team
- Energetic and passionate about the United Way and its mission

- Able to work independently with little supervision
- Early morning, evening and weekend work will be required

**Essential Physical Functions**

- Driver's license required
- Occasional bending and lifting of heavy materials

**Position Type**

- Full-time, exempt, salaried
- Typical office hours are Monday through Friday, 8:30 am – 5:30 pm with an hour for lunch
- Occasional travel within Collier and Lee Counties expected as well as out of state, overnight travel for annual conferences

**Equal Employment Opportunity Statement:**

The United Way of Collier County values diversity in the workplace and among our agencies and customers. We provides equal opportunity for employment and promotion to all qualified employees and applicants on the basis of experience, training, education, and ability to do the available work without regard to race, religion, color, age, sex/gender, sexual orientation, national origin, gender identity or expression, disability, marital status, veteran status, genetic information, ancestry or any other status protected by law.

Furthermore, The United Way of Collier County is committed to providing an equal opportunity workplace that is free of discrimination and harassment based on national origin, race, color, religion, gender, ancestry, age, sexual orientation, gender identity or expression, disability, marital status, veteran status, genetic information or any other status protected by law.

**Send Resume and Cover Letter to:**

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