

Title:	Major and Planned Gifts Officer	Group/Team:	Resource Development
Reports To:	Executive Development and Marketing Officer	Status:	Full Time (37.5 hours)
FLSA Classification:	Exempt	Minimum Salary:	\$84,800

POSITION SUMMARY

The philosophy of balancing equity and successful donor cultivation at our organization is at the heart of our mission, which is deeply intertwined with the principles of equity and the advancement of ALICE (Asset Limited, Income Constrained, Employed).

As the Major and Planned Gifts Officer, you will use your experience in fundraising and your passion for centering people and equity to make a meaningful impact by securing transformational gifts that will shape the future of the organization and reinforce its commitment to equity and ALICE.

You will develop strategies, centering our commitment to equity and community collaboration, to meet the annual fundraising goals and play a critical role in driving our fundraising efforts to new heights, cultivating and stewarding relationships with our most generous donors. With a proven track record of success in securing six- and seven-figure gifts, you will inspire, lead, and mentor our team of gift officers to reach their full potential.

As Major and Planned Gifts Officer, you will have the opportunity to work with a talented and dedicated team, collaborate with executive leadership, and build partnerships with philanthropic leaders across the region. This is a strategic leadership position working closely with senior staff and board members to develop and implement innovative fundraising strategies that will propel our mission forward.

This position offers hybrid work opportunities and can be located out of the (a) Battle Creek, (b) Kalamazoo, (c) Jackson, or (d) Lansing offices. Routine travel within the region required.

KEY RESPONSIBILITIES/ESSENTIAL DUTIES OF POSITION

- Contribute to an equitable, diverse and inclusive organizational culture that centers people in every solution, process and function.
- Develop and implement a donor cultivation strategy that aligns our equity framework, mission, and strategic priorities.
- Develop and execute strategies to identify, research, cultivate and solicit qualified prospects for major and planned gifts in collaboration with the CRDMO and the Associate Director of Major Gifts.
- Working with leadership and other Resource Development team members, set goals for each donor in the portfolio based on past giving history, engagement level, propensity, and affinity.
- Cultivate relationships with individual donors and prospects, through personal visits and other forms of direct personal contact in accordance with performance targets.
- Develop and implement year-round engagement strategies for all donors above \$5,000.
- Maintain appropriate records on all donors and prospects, document substantive donor interactions in the CRM platform, ensure confidentiality with sensitive information. Provide progress reports, as requested.
- Expand and grow donor base beyond historic United Way corporate campaign participants.

- Collaborate with the communications, marketing, grants teams to develop compelling donor prospects and stewardship reports. Collaborate with finance and programs teams to obtain information on the use of donor funds and communicate the impact of these dollars to donors.
- Responsible for establishing UWSCMI Legacy Society program to grow revenue from planned gifts as well developing relationships with the Planned Giving community.
- Hire, manage and develop an effective team that promotes equity, diversity, and inclusion. Partner with Leadership Team to support and cultivate staff to have the required skills needed to further the organization's mission. This includes creating a culture of belonging that sets clear expectations and shares and welcomes feedback.
- Participate in the development, management and monitoring of department goals and objectives supporting the organization's strategic plan.
- Other duties as assigned.

DIRECTION OF OTHERS

Associate Director of Major Gifts

JOB REQUIREMENTS

- Demonstrates a commitment to equity, diversity and inclusion and ability to apply anti-oppressive and anti-racist principles in the workplace.
- Progressively responsible individual donor cultivation at the \$10,000 level and above for major gifts and/or planned giving experience with demonstrated achievement growing programs, revenue and cultivating donor relationships. Formal education such as a bachelor's degree in business, non-profit management, public relations, marketing, sales, or related field or professional certification in major or planning giving or fundraising may substitute or supplement experiences to meet this requirement.
- Demonstrated experience supervising and cultivating equitable and people-centered environments in which staff can succeed.
- Excellent listening, written and verbal communication skills.
- Experience executing strategies that support the organization's values and strategic direction.
- Ability to take initiative and be creative in thinking and solutions. Strong presentation, public speaking and project management abilities.
- Maintain a deep understanding of and personal alignment for United Way of South Central Michigan programs and initiatives.
- Presence and confidence to project credibility to high-income prospects and donors.

WORK ENVIRONMENT AND PHYSICAL DEMANDS

- Ability to work in front of a computer for extended periods of time.
- Frequent sitting, standing and walking.
- Reliable transportation for local travel. Use of a personal motor vehicle for transportation requires proof of insurance and the driver must have a valid Driver's license.
- Occasional work outside of normal business hours.
- Successful completion of a criminal background check.
- Candidate must be able to work successfully in a remote environment with private office space and high-speed internet.



SALARY

All the roles within UWSCMI have pay ranges that commensurate with the knowledge, skills, and abilities of the successful candidate. The minimum salary for this position is **\$84,800**.

ABOUT UWSCMI

United Way of South Central Michigan (UWSCMI) gathers the power of three legacy organizations—Capital Area United Way, United Way of the Battle Creek and Kalamazoo Region, and United Way of Jackson County—to mobilize financial and volunteer resources, partners, and voices, creating equitable and lasting change for the most vulnerable people in our communities.

Our vision: Strong, caring communities where every person is valued, thriving, and connected for the common good.

Our path: Our work lifts our local communities by reducing racial and economic disparities; addressing the needs of ALICE (Asset-Limited, Income Constrained, Employed) households in financial stability, education, health, and basic needs; and creating opportunities for every person to reach their full potential.

EQUITY, DIVERSITY, AND INCLUSION

UWSCMI is committed to dismantling systemic inequities that continue to cause harm for Black, Indigenous, and other People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) people, women, and people with disabilities. We believe that these communities must be centered in the work we do. We strongly encourage applications from people with these identities or who are members of other marginalized communities. Together, we will continue to build capacity and accountability into our policies, practices, and partnerships.

NOTE

All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

BACKGROUND CHECK DISCLOSURE

We require background checks for certain roles. The checks are completed by ProScreening and results are only ever communicated to the Hiring Manager if they may impact someone's employment. We do not use prior arrests, only convictions. These convictions will only be considered as hiring criteria if they are directly connected to the roles & responsibilities of the job (for example, financial related convictions for a finance officer). We know that the criminal justice system is not equitable, and negatively impacts marginalized communities - specifically people of color - at rates much higher than other identities. This is why our background check process is only in place for explicit situations.

TOTAL REWARDS PACKAGE

United Way of South Central Michigan (UWSCMI) offers a competitive total rewards package including a competitive salary, medical coverage with an employer contribution of 90% towards single coverage and 75% towards dependent coverage, dental and vision with a 90% employer contribution towards single and dependent coverage, life insurance with an employer-paid benefit of 2 times annual salary, short-term disability and long-



term disability effective the first of the month following hire. In addition, UWSCMI provides a 10% employer contribution into the 403(b) retirement plan each year with full vesting after 3 years of service and 20 days Paid Time Off, 13 days Paid Sick Time, 5 Paid Volunteer Days, 3 Floating Holidays and 11 Paid Holidays each year (Paid time off, sick time. Paid volunteer time and floating holidays are prorated the first year). Hybrid and/or remote work arrangements are available for many positions.

TO APPLY:

Submit your application online via <https://unitedforscmi.org/careers/> by March 10, 2024

United Way of South Central Michigan is an Equal Opportunity Employer committed to the principles of equity, diversity, and inclusion.