

**Position:** Major Gifts Officer  
**Organization:** United Way of Santa Barbara County  
**Duration:** Full Time (40 Hours/Week)  
**Location:** 320 E Gutierrez Street, Santa Barbara, CA (In-Office)  
**Reports to:** Director of Operations & Advancement  
**Compensation:** \$36-\$45 /Hour

**Position Overview:** Major Gifts Officer

Under the direction of the Director of Operations & Advancement, the Major Gifts Officer will lead United Way of Santa Barbara County's Major Gifts program, which includes stewardship, management, and prospecting of United Way's Major Giving portfolio. This position will act as the primary account manager for relationships with private and family foundations, individual donors, and institutions that qualify for Major Gifts (\$10,000+) and will also support prospecting and step-up strategies for donors that fall within the Leadership giving tier (\$1,000-\$9,999). The Major Gifts Officer will work across the organization to ensure targets for revenue and engagement are met for this portfolio, and will prioritize United Way's standard of excellence, trustworthiness, and transparency in all efforts and strategies.

**Key Responsibilities:**

RELATIONSHIP MANAGEMENT

- Under the direction of the Director of Operations & Advancement, facilitate individual and foundation giving strategy.
- Manage a portfolio of 100+ Individual giving accounts and prospects.
- Steward relationships with key members of foundation leadership, including board and trustees, program committees, and other officers.
- Facilitate meetings with foundation and individual High Net Worth donors.
- In collaboration with the Director of Operations & Advancement, maintain, augment, and actively pursue a general listing of key individual and foundation prospects.
- Set prospecting targets to both establish new relationships and increase overall revenue through foundation grants, private event participation and sponsorships, and individual giving.
- Stay up-to-date with key community updates, news, mergers, and other current events that may impact relationship strategy and fundraising efforts.
- Prioritize a positive, professional, and expert presence across all donor relationships.
- Maintain and encourage participation in key affinity groups and honorary listings, including the Executive Club, Young Leaders Society, Leadership/ADT+ Giving Circles, Women United, and the Heritage Club.

ANNUAL GIVING PLANS & LOGISTICS

- Lead management and logistics for all active donor relationships, including accounting and payroll processing direction, special events & presentations, and recordkeeping.
- Create and deliver donor communications in line with established United Way templates and materials, including newsletters and updates, publications and flyers, presentation decks, and emailed communications.
- Prepare and present tailored gift proposals and philanthropic opportunity materials that reflect each donor's interest, capacity, and giving history.
- Work with the Database Coordinator, Chief Financial Officer, and external processing vendors to ensure consistent and accurate reporting, accounting, and processing.
- Ensure timely gift acknowledgements for portfolio donors and foundation leadership.

EVENTS & REVENUE GENERATION

- Utilize best practice fundraising and development strategies to increase all channels of Major Giving revenue, including special events, foundation grants, and sponsorships.

- Prioritize United Way's commitment to its ethical, partnership-first approach in all revenue generation and development efforts.
- Work with affinity group and event committees to establish engagement events and activities that generate revenue, donor awareness and engagement, and positive community culture.
- Facilitate HNW individual and Foundation participation in United Way annual events and activities, including the ADT & Leadership Reception, United Luncheon, and Red Feather Ball.
- Facilitate sponsorship requests for Major Giving accounts for the United Luncheon and Red Feather Ball.
- In collaboration with the Director of Operations & Advancement, maintain United Way's Foundation grant cycle, including supporting proposals, Letters of Inquiry (LOIs), and reporting.

#### CROSS FUNCTION & REPORTING

- Collaborate with United Way's Community Impact team to maintain updated and impactful program updates, messaging, and impact stories.
- Work closely with Community Impact program teams to facilitate donor program engagement and volunteer opportunities such as Lunch Bunch, the Holiday Gift Drive, and site visits.
- Maintain a presence at program partnership opportunities with Community Impact staff that engage Major Gifts donors, such as program delivery partners at Fun in the Sun.
- Collaborate closely with United Way's Finance & Operations teams to ensure accurate financial reporting, prompt processing and updates, and clear designation requirements.
- Maintain all campaign updates, donor communications, event participation, and relationship updates in United Way's CRM tool.
- Prioritize clean donor data management, including communications, donor information, and financial reporting.
- Provide weekly and monthly campaign performance reports to the Director of Operations & Advancement.
- In collaboration with the Director of Operations & Advancement, support Major Gifts contributions and engagement reporting for organizational updates and Board of Directors meetings.

*Additional duties may be assigned to this role as organizational projects, activities, and priorities evolve.*

#### **Qualifications:**

- Bachelor's degree in business, communications, fundraising or a related field.
- 3+ years of fundraising experience, with a preference for experience in managing Major Gifts portfolios and relationships.
- Strong written and verbal communication skills.
- Familiarity with donor-centered communication strategies and approaches.
- Detail-oriented and able to multitask effectively in a dynamic environment.
- Self-motivated and eager to learn and contribute to team efforts.
- Ability to work collaboratively with a diverse group of individuals.
- Basic knowledge of event planning principles is preferred.

#### **Physical Demands and Work Environment**

The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**About United Way of Santa Barbara County:**

Since 1923, United Way of Santa Barbara County has been a key leader in local efforts to empower children, families, and communities through its own unique collaborative programs and initiatives, partnership convening efforts, volunteer development, and funding. United Way’s mission is to enrich the lives of children and families and build resilient communities by leading local programs and partnerships that improve academic achievement, financial security, and community resiliency. To learn more, please visit [unitedwaysb.org](http://unitedwaysb.org).

**Core Competencies**

<b>Mission-Focused</b>	All United Way employees recognize that the organization’s top priority is to create real social change that improves lives and changes community conditions. This drives their performance and motivations.
<b>Relationship-Oriented</b>	All United Way employees are responsible for cultivating and managing relationships, fostering an atmosphere of trust, while taking a collaborative approach to addressing issues.
<b>Results-Driven</b>	All United Way employees are accountable for achieving individual performance goals in support of organizational goals.
<b>Brand-Steward</b>	All United Way employees are stewards of the brand and understand their role in protecting the reputation of the organization.
<b>Continuous Learning</b>	All United Way employees demonstrate a desire to acquire knowledge, skills, and abilities necessary to perform effectively.
<b>Critical Thinking</b>	All United Way employees use critical thinking skills to solve problems through basic research, analysis, and interpretation.
<b>Professional Behavior</b>	All United Way employees conduct themselves in a professional manner and follow organizational guidelines and standards.

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*United Way of Santa Barbara County provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.*

*This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.*