



Philanthropy and Engagement Manager Job Description

This is a full-time position in South Sarasota County
Reports to: Chief Operating Officer

Position Summary:

In coordination with the COO, the Philanthropy and Engagement Manager is responsible to plan and execute effective development and outreach initiatives to reach annual fundraising and program goals, strengthen relationships with key constituencies, raising funds for UWSSC through major gifts, planned gifts from individual donors, including gifts through bequests, life insurance and stock transfers, as well as annual mailing campaigns, events and other donor development opportunities. The Philanthropy and Engagement Manager will support UWSSC's commitment to excellent customer service by facilitating relationship building with donors, volunteers, and community stakeholders.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- In collaboration with the CEO and COO develop and execute an annual fundraising plan that includes residential campaigns, digital fundraising campaigns, in-person events and virtual events, donor development, legacy gifts to maximize revenue generation.
- Act as a Staff Liaison and provide support to the UWSSC Philanthropy Committee.
- Attend designated meetings and events throughout the community representing UWSSC.
- Take the lead on planning and implementing designated events and donor solicitations.

Development

- Conceptualize and execute a comprehensive, multi-faceted donor, stakeholder, plan that supports the organization's strategies and objectives, builds relationships with key audiences, and works to position UWSSC as a leader in the community.
- Develop new opportunities to raise awareness of UWSSC.
- Represent UWSSC at community speaking engagements and presentations.

Cultivating Legacy Gift Donors and Major Gift Donors

- Works closely with the COO to develop and execute strategies to identify, research, cultivate and solicit qualified prospects for major and planned gifts.
- Sets annual individual giving goals with the COO identifies opportunities and strategies for achieving new and increased gifts.
- Develops guidelines for planned giving marketing campaigns and works collaboratively with staff to identify donor prospects through internal and external marketing.
- Maintains records of existing and prospective legacy donors and major gift donors for tracking purposes.
- Cultivates personal relationships with donor prospects and pursues a moves management strategy which consists of donor visits, contact through mail, phone, e-mail, events, and legacy circle opportunities for the purpose of soliciting and confirming legacy gifts and major gifts.
- The Philanthropy and Engagement Manager will work closely with the Community Impact Manager on shared events and donor cultivation.

Donor Stewardship of Legacy Donors and Major Gift Donors

- Maintains a portfolio of confirmed legacy donors and major gift donors.
- Implements well-organized, personal stewardship plan for each donor that offers continued engagement with UWSSC, stewards existing planned gifts and solicits other giving as appropriate.
- Sends personal letters and proposals for additional giving opportunities as appropriate.
- Organizes special events with legacy donors and major gift donors.

- Trains executives, board members and volunteers in planned giving solicitation techniques and information/records management. Serve as information resource on planned giving issues. Encourages donor stewardship through the legacy and major gifts circles with event participation and coordination.
- Coordinate activities such as small cultivation events, community networking, one-on-one meetings, etc. to forward the legacy gifts and major gifts program and solicitation of donors.

Decision Making:

Exercises decision making discretion in the day-to-day operations of the major gifts and legacy gifts program on an independent basis and in consultation with the COO.

Reporting:

The Philanthropy and Engagement Manager reports to the COO and will submit periodic written and verbal reports and analysis of departmental progress as well as preparing monthly reports to the Board of Directors.

External Relationships:

The Philanthropy and Engagement Manager develops and maintains relations with potential legacy donors; other charitable and non-government organizations; lawyers; financial planners; home healthcare providers, staff of assisted living facilities; consultants; fundraising associations; professional development groups, and professional publications.

Qualifications:

- Bachelor's Degree or equivalent experience.
- Five years of experience in development, legacy giving and appeals, fundraising and major gifts with a proven track record of success.
- Experience in developing and maintaining donor relationships.
- Excellent communications skills, verbal and written, including in digital environments.
- Excellent interpersonal skills with a customer service orientation and the ability to interact with individuals from a variety of social backgrounds.
- Proven ability to build, lead and inspire members of a team.
- Ability to use Microsoft Office Suite, Constant Contact, social media, databases, data management and CRM or other database software.
- Access to reliable transportation, proof of insurance, and a valid driver's license.
- Demonstrated excellence in project management, communication, and organizational skills.
- Demonstrated ability to work well independently as well as in a team.
- Must be a goal driven self-starter willing to attend after hour events, meetings, and networking activities.

Physical Requirements:

The employee is regularly required to communicate clearly, in oral and written formats, with others in person, over the phone, and via other devices. The employee must be able to transcribe, read extensively, prepare, and analyze data and figures, operate a computer and other standard office machinery. The employee is required to regularly travel to offsite locations to set up presentations and display physical and electronic forms. The employee must have the ability to lift, carry, push and/or pull objects weighing up to 30lbs.