



UNITED WAY OF LEBANON COUNTY

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED

Director, Major & Planned Giving

United Way of Lebanon County is currently seeking a talented professional or retiree to serve as the Director of Major and Planned Giving. This position will play a vital role in ensuring UW continues to serve as the leader in the non-profit community for generations. The Director is an experienced fundraiser or community leader focused on mission and values and shares our vision for ensuring a better future for all children, families and adults living in Lebanon County.

Position Summary: The Director is responsible for creating and implementing strategies and building relationships that advance United Way's community building mission. Working independently and in conjunction with board members, staff and volunteers, the director will steward relationships with pacesetter and Tocqueville donors, prospective donors, foundations and grant funding institutions leading to measurable increased investments in and engagement with United Way of Lebanon County.

Classification: Full-time, exempt; Competitive Market Rate Salary, DOE

Key Responsibilities:

- Create, prioritize and execute a major gift and planned giving strategy for Pacesetter, Tocqueville Society and Red Feather giving at a net growth rate number (donors) and percentage (dollars) consistent with the plan
- Identify, qualify, cultivate and solicit prospective major and planned gifts in collaboration with board and CEO
- Plan and execute a series of donor and prospect engagement events and recognition events
- Cultivate relationships with trust officers, financial planners, accountants, lawyers and estate planning professionals
- Secure federal, state and/or local funding, and private foundation grant funding
- Develop working committees of current and past board members, donors, trust officers and attorneys to facilitate planned giving initiatives
- Oversee a comprehensive CRM system for all major and planned gifts and prospects

Qualifications: Ten years professional work experience; BA/BS required; Familiarity with financial planning is preferred; Advanced analytical skills to research and identify giving potential; Exceptional interpersonal and communication abilities; Proven ability to create a climate of confidence and trust with stakeholders; High-level of Computer, CRM and technology proficiency; and, a passion for United Way's mission, vision and accomplishments.

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.
- **Relationship-Oriented:** Understands that people come before process and is 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.

Work Schedule: Core Hours of Monday-Friday, 8:30 a.m. to 4:30 p.m. Must be available to work a flexible schedule with early morning, evening, and weekend work as needed.

Work Environment: This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; balance; stoop, kneel, crouch or crawl; talk or hear; The employee may occasionally lift or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

Travel: Travel is primarily local with occasional out-of-area and overnight travel

Other Duties: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Equal Employment Opportunity (EEO): United Way of Lebanon County is an equal opportunity employer in its policies, actions and goals in compliance with state, federal and local laws and regulations. It is the policy of UWLC to grant equal opportunity to all qualified persons without regard to race, color, age, gender, sexual orientation, religion, disability, national origin or other legally recognized basis for illegal discrimination.

For consideration, please forward a cover letter, resume and salary requirements to Kenny Montijo, kmontijo@unitedwaylebco.org.