

Director of Endowment and Planned Giving

LIVE UNITED



United Way of Buffalo & Erie County
www.uwbec.org

The United Way is seeking a dynamic, energetic and results driven individual for our Director of Endowment and Planned Giving position. This position executes strategies that raise awareness and support for the long-term sustainability of the United Way of Buffalo & Erie County. This is accomplished through a variety of activities including but not limited to prospecting and securing planned, estate and endowment gifts, providing support to the Endowment and Planned Giving Committee and increasing the visibility and importance of legacy giving in the community. This position reports to the Director of Resource Development.

Responsibilities:

- Manages a portfolio of prospective donors and works to continually identify, cultivate, solicit and steward current and new constituents for planned gifts.
- Conducts research to identify potential prospects for specific planned gifts from among current donors, identifying new donors through thoughtful and targeted research, and through networking among professional family planners, accountants, life insurance representatives and financial advisors.
- Develops and maintains donor engagement and recognition plans to help create meaningful relationships and implements strategies to ensure year-round relationship to increase revenue.
- Responsible for providing leadership to the planning, execution, and growth of an endowment and planned giving campaign.
- Provide staff leadership and direction to the Endowment & Planned Giving Committee.
- In collaboration with major gift volunteers and staff, identify individuals, corporations, and foundations with interest in and capacity to make outright gifts to the United Way's endowment.
- Track, report and achieve annual/long term endowment campaign goals and objectives.
- Actively engage in relationships with major gifts, foundations, marketing, annual campaign staff and volunteers to ensure the endowment campaign is represented/ integrated into their efforts.
- Develop customized proposals that fulfill donors planned giving and endowment gift requirements in partnership with the Community Impact team and Director of Grants.
- Present and assist in the education of investment advisors and organizations on the benefits of supporting the United Way of Buffalo & Erie County.
- Manage an ongoing direct mail/online distribution program that provides endowment and planned giving information to engage prospects and generate leads.
- Engage in job-related travel to special legacy giving meetings, conferences, and events as appropriate.
- Keep United Way Leadership team and Board of Directors engaged and informed of Endowment & Planned Giving efforts.
- Design and confirm the Endowment and Planned Giving Strategy in discussion with senior leadership and key volunteers.
- Actively engage and collaborate with key volunteers to help promote and grow the planned giving footprint.
- Represent the United Way at Community functions and activities to network and help promote and develop additional business through the development and expansion of referral sources.
- Participate in mandatory meetings (organizational, departmental, committee) and training programs to enhance product knowledge and cross-selling skills.

- Visibly demonstrate United Way values of services, integrity, collaboration, accountability, and innovation.
- Engage in job-related travel to designated meetings, conferences, and events.
- Maintain established departmental policies, procedures and objectives.
- Perform general offices duties such as typing, filing, data entry, opening mail, etc.
- Perform other duties as requested.

Skills, Knowledge, Experience:

- Advanced degree preferred in management, marketing, development, leadership or related field.
- Minimum of 7 years in operations, leadership and customer relations management roles with experience in a variety of fundraising efforts.
- Passion for donor-centricity.
- Demonstrated experience at executing philanthropic initiatives with individuals and families.
- Familiarity with investment performance reports.
- Solid sales and strong relationship management including an understanding of “moves management.”
- Excellent communicator with strong public speaking, writing and listening skills.
- Ability to persuade and inspire volunteers, professional advisors and potential donors.
- Effective volunteer management and proven experience working in a cross-functional collaborative team environment.
- Highly motivated by results, pro-active and possesses high standards of confidentiality.
- Database proficiency with proven experience utilizing information systems to capture key donor information and utilize for decision making.

Contact Information:

For consideration please email a cover letter, resume and salary history to jobs@uwbec.org attention Beth Sullivan, Human Resource Manager. Resumes without a cover letter will not be considered. No phone calls please.

United Way of Buffalo & Erie County has a commitment to equal opportunity employment by affirming the value of diversity and by promoting an environment free from discrimination. UWBECC encourages people of diverse backgrounds and experiences to apply for this position.