

Position: COMMUNITY INVESTMENT ADVISOR
Hiring Organization: United Way of Salt Lake
Department: RESOURCE DEVELOPMENT
Reports to: CORPORATE RELATIONS DIRECTOR
Date Created: June 2, 2016

THE ORGANIZATION

United Way of Salt Lake (UWSL) has made a promise to our community—to change the odds so all children and their families have the same chance to succeed in school and life. We have adopted a unique approach to community problem-solving called collective impact which allows us to directly engage with communities. Our workplace is fast-paced, friendly, and adaptive. At UWSL we believe in celebrating success, learning from failure, and ambitious goals. Our wages are competitive; the benefits package is comprehensive; perks like flexible schedules and staff parties make every day unique.

POSITION OVERVIEW

The Community Investment Advisor works under the direction of the Senior Community Investment Advisor (SCIA) to effectively solicit individual and corporate investments to United Way of Salt Lake through year-round management of a workplace-giving account portfolio. Responsibilities include: developing workplace employee giving campaigns, forecasting revenue projections, overseeing donor stewardship, and researching and building new corporate partnerships.

KEY RESPONSIBILITIES

1. Manage cultivation of, and stewardship for, a portfolio of existing workplace accounts on a year-round basis
2. Build relationships and develops individual strategies within account portfolio to maximize revenue, increase donor loyalty, and meet community impact objectives
3. Work with RD leadership to strategize and develop new business partnerships to grow revenue through employee workplace campaigns, corporate gifts, and sponsorships
4. Provide training and support to Employee Campaign Managers (ECM's) on how to implement a successful employee workplace giving campaign. Develop strategy with ECM for year-round engagement of each company and its employees through advocacy and volunteer opportunities
5. Coordinate year-round communication strategy with internal and external stakeholders
6. Articulate the mission and vision of United Way of Salt Lake to diverse companies and community audiences through group presentations and individual meetings during workplace employee giving campaigns
7. Respond to donor questions and resolves issues in a timely manner
8. Work effectively with Leadership Giving Directors and donor network members to maximize leadership giving and engagement within assigned accounts
9. Forecast revenue projections and monitors progress of accounts throughout the workplace campaign
10. Collect data on campaigns, evaluates results, and proposes recommendations. Responsible to keep SCIA apprised of any potential projection changes in a timely manner and efficiently reconciles projections and actual pledges processed

11. Ensure timely thank you for individual and corporate contributors. Responsible to manage all workplace giving campaign-related tasks in a timely manner and to use prescribed processes including the use of donor database
12. Other duties as assigned

QUALIFICATIONS

- Able to produce professional communication—written and verbal
- Ability to maintain positive working relationships with corporate and employee donors
- Experience with Excel, CRM, and database systems
- Proven presentation and interpersonal skills
- Ability and means to travel, and accommodate flexible scheduling
- Professional demeanor and appearance with unquestioned ethics

MINIMUM REQUIREMENTS

- Bachelor's Degree, or equivalent work experience
- 1-2 years of fundraising or sales experience
- Proficient with Google and Microsoft Suites

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 locations outside of UWSL facilities to set-up displays and presentations in both physical and electronic forms. The employee must have the ability to lift, carry, push and/or pull objects weighing up to 50lbs.

SALARY INFORMATION & FLSA STATUS

This is a non-exempt position; pay commensurate with experience

TO APPLY

Send completed applications to jobs@uw.org. Complete applications include a cover letter, resume, and employment application. Employment applications and the complete job description can be found at <http://www.uw.org/about-us/careers.html>

NOTE: The statements in this position description are intended to describe the general nature and level of work being performed but are not to be seen as a complete list of responsibilities, duties, and skills required of the person employed. Also, the statements do not establish a contract for employment and are subject to change at the discretion of the employer.