

**Position:** VICE PRESIDENT, INDIVIDUAL AND PLANNED GIVING  
**Hiring Organization:** United Way of Salt Lake  
**Department:** Resource Development  
**Reports to:** Chief Development Officer  
**Date Created:** November 28, 2016

### **THE ORGANIZATION BACKGROUND**

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 VP, Individual and Planned Giving (VPIPG) works under the direction of the Chief Development Officer and in support of the strategic vision, mission, and goals of United Way of Salt Lake by leading the development and execution of a strategic plan to secure investments of \$10,000 to \$1,000,000+, as well as the process of securing substantial wealth transfers including bequests, annuities, appreciated stock, estate designations, insurance and retirement plans and gifts of property. Areas of focus include annual, planned, estate and special campaign giving, by individuals, foundations, trusts and family offices. The VPIPG is responsible to research, develop, implement, and refine strategies to identify, cultivate, and steward new and existing donors for increased growth and retention of principal and major investors, as well as a focus on the documented wealth amassed by the retiring “boomer” population. Additionally, VPIPG contributes to the development, sponsorship and in-kind resources to support events and activities designed to achieve these goals. Supervises and coaches Leadership Giving Directors. Maintains accurate donor records and revenue projections and reports accordingly to CDO. Provides leadership and vision to building sustainable revenue sources.

### **KEY RESPONSIBILITIES**

1. Working within established Donor Network structures, provides leadership and vision to research, develop, implement, and sustain strategies for securing increased and new annual and multi-year investments of \$10,000 to \$1,000,000+ from individuals, foundations, and corporations. Researches best practices and excels in innovation of strategies. Establishes and tracks progress against measurable monetary goals and supporting activities.
2. Researches and monitors emerging trends, best practices and regulations around significant assets held by the current retiring workforce. Designs strategies to communicate with and engage this segment, with compelling and effective major gift options.
3. Supports the retention and growth of principal and major donors to increase sustainable revenue and resources under management. Identifies, researches, cultivates and stewards, individuals as well as local and national foundation prospects, through the various stages of the active donor cycle. Identifies areas of interest and aligns those with UWSL. Develops strategies to increase annual giving and broaden types of giving, including planned giving.

4. Builds and leads individualized cultivation and stewardship plans for principal gift opportunities. Evaluates capacity to increase giving and personal commitment to UWSL. Works closely with the CDO to maximize the philanthropic potential and engages and collaborates with all departments on strategy for major and planned giving opportunities. As needed, works with grants specialist on written proposal development, submission, acknowledgement, and subsequent reporting.
5. Hires, manages, and leads Leadership Giving Directors. Provides coaching and support in the development and implementation of donor network engagement strategies. Creates a major gifts pipeline among donor networks and holds team members accountable for activity and results. Manages and provides feedback on individual performance. Responsible for the success of the team's growth and major gifts efforts.
6. Prepares and advises the CDO and other appropriate executive level management and board members, as needed, to cultivate and secure investments. Conducts research, provides background, determines investment level, hosts briefings, and supports related communications material development. Develops and supports board-level committees or works with existing committees as needed.
7. Works together with RD leadership team to leverage existing strategies and infrastructure combined with database tools, metrics, and analytics to segment, cultivate and grow a pool of relevant prospects. Uses this information to develop best practices and improve revenue projection.
8. Sets vision for related cultivation and stewardship events and projects and secures sponsorship underwriting. Understands business and community affairs and attends networking events to increase organizational visibility.
9. Projects, tracks, and reports revenue of all principal gifts, and planned giving efforts. Keeps CDO and resource development team engaged and informed. Ensures existing policies are kept up-to-date and develops new policies as needed.
10. Collaborates with Marketing and Engagement, and other departments as necessary to achieve optimal use of digital engagement and organizational resources; maintains good working relationships with colleagues.
11. Acknowledges donors using a variety of communications methods. Writes and prepares content for online and other written communications (newsletters and other updates).
12. Ensures all contact information, call history, and other information pertaining to current and prospective donors is retained in database of record.
13. Supports all resource development efforts. Accepts other duties as assigned.

## **REQUIREMENTS**

- Demonstrated and proven successful experience in building and developing external relationships, oriented in the solicitation of major gifts, and specifically, in legacy and planned giving
- Extensive knowledge of the local community, and well-connected to its resources
- Demonstrated leadership and initiative in developing and executing major gift strategies
- Proven ability in consistently producing high quality work and development outcomes
- Ability to innovate and adapt to the shifting demands of different situations
- Exhibits highest level of integrity, professionalism, and confidentiality
- Outstanding communication skills, including: interpersonal, writing, presentation, public speaking, and listening
- Ability to build effective teams, direct work, develop talent and manage conflicts

- Ability to work well with and inspire confidence in United Way staff, volunteer leadership, and current and prospective donors.
- Demonstrated advanced proficiency with computer technology and Microsoft software applications, including: Outlook, Word, PowerPoint, and Excel
- Knowledge and experience using CRM software

#### **MINIMUM QUALIFICATIONS**

- Bachelor's degree in a related field required
- 5+ years' experience in principal and major gifts, as well as planned giving fundraising
- Experience with capital campaign preferred, and endowment campaign required
- Team leadership or management experience

#### **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**

This is an exempt position, salary to commensurate with experience.

#### **TO APPLY**

Send completed applications to [jobs@uw.org](mailto: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: This job description is given to provide information about the position's general nature and is not an all-inclusive list of its responsibilities, skills or required abilities, which may change.*