

POSITION DESCRIPTION

Position: Community Investment Advisor
Hiring Organization: United Way of Salt Lake
Salt Lake City, UT
Department: Resource Development
Reports to: Corporate Relations Director
Posted: April 1, 2014
uw.org

ORGANIZATION BACKGROUND AND EVOLUTION

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. Our role has evolved from primarily a fund-raising, fund distribution organization to what it is today - a community problem-solving organization, dedicated to advancing the education, income and health of our neighborhoods and communities to ensure that every child succeeds, every step of the way, from cradle to career.

UWSL has adopted a unique approach to community problem-solving called Collective Impact. Collective Impact brings many different sectors together to find new and innovative ways to address challenges and develop lasting changes.

UWSL is committed to excellence. We have adopted high standards of accountability and operate with integrity and transparency. We provide outstanding customer service.

WORK ENVIRONMENT

UWSL's work environment is fast-paced, friendly, committed, nonpartisan, and ever changing. Employees are dedicated, appreciated, and recognized for their efforts, and all levels of management are engaged in the work daily. We offer competitive wages and a generous, comprehensive benefit package. The internal focus continues to be on high-level results – communicating, aligning, and integrating around the organizational goals.

POSITION OVERVIEW

The Community Investment Advisor works under the direction of the Corporate Relations Director to effectively solicit individual and corporate investments in 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. Manages cultivation and stewardship for a portfolio of existing workplace accounts on a year-round basis. Builds relationships and develops individual strategies within account portfolio to maximize revenue, increase donor loyalty, and meet community impact objectives.
2. Works with Corporate Relations Director to strategize and develop new business partnerships to grow revenue through employee workplace campaigns, corporate gifts and sponsorships.
3. Provides training and support to Employee Campaign Managers (ECMs) on how to implement a successful employee workplace giving campaign. Develops strategy with account ECMs for year-

round engagement of each company and its employees through advocacy and volunteer opportunities available through United Way of Salt Lake. Coordinates year-round communication strategy to keep employees informed about the difference their donations make.

4. Articulates 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. Responds to account/donor questions and resolves issues in a timely manner.
5. Works effectively with Leadership Giving Directors and donor network members to maximize leadership giving and engagement within assigned accounts.
6. Forecasts revenue projections and monitors progress of accounts throughout the workplace campaign. Collects data on the campaign, evaluates results, and proposes recommendations. Responsible to keep Corporate Relations Director apprised of any potential projection changes in a timely manner and efficiently reconciles projections and actual pledges processed.
7. Ensures 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, Andar.
8. Maintain continuous communication with Corporate Relations Director.

POSITION REQUIREMENTS

- Outstanding communication skills, including: listening, writing, presentation, and public speaking.
- Creative. Detail-oriented. Self-starter.
- Ability to work well with and inspire confidence in current corporate and employee donors, staff, and prospective donors, including community business leaders.
- Excellence in building and maintaining business and personal relationships.
- Familiar with computer technology and Microsoft software applications including Outlook, Word, PowerPoint, and Excel. High comfort level with Excel very helpful. Familiarity with customer database systems helpful.
- Ability to have a flexible schedule, including occasional weekend hours
- Sales background/understanding helpful.

MINIMUM QUALIFICATIONS

- Bachelors Degree and 1-2 years fund raising or sales experience preferred
- Strong presentation and interpersonal skills
- Professional appearance

SALARY INFORMATION

\$38,000 - \$42,000

TO APPLY

Interested applicants should submit a cover letter, resume, and employment application. Employment applications and information about the application process can be found at <http://www.uw.org/about-us/careers/>.