



UNITARIAN UNIVERSALIST
ASSOCIATION OF CONGREGATIONS

Updated: April 14, 2008
Position Title: Gift Officer
Staff Group: Stewardship and Development
Reports To: Campaign Manager
Location: Boston, Massachusetts (preferred, but open to offsite locations depending on candidate qualifications)
FLSA: Exempt
Grade: 11, full-time

Basic Purpose: The Gift Officer will manage a portfolio of no fewer than 100 individuals defined as major gift prospects and is responsible for identifying, qualifying, cultivating, soliciting, and stewarding major gifts.

Principal Responsibilities

1. Work both independently and as part of the campaign team to manage relationship building, cultivation and solicitation (including face-to-face visits) within an assigned portfolio of individual major gift donors and prospects. Assess giving potential, recommend target ask amounts, and develop personalized strategies for campaign and annual gifts.
2. Work with Campaign Manager to prioritize research needs and develop presentation materials to inform prospect strategies, including background information, scripts and talking points, as well as gift proposals for meetings with individuals. Work as part of a team to identify sources of support from individual major gift prospects and renew existing annual gifts as needed.
3. Participate actively in Gift Officer meetings with other development staff to identify and assign new prospects and to share and request ideas for cultivation and solicitation strategies. Prepare and file timely and complete contact reports and ensure effective prospect management systems.
4. In the course of cultivating donors and prospects, identify potential candidates for planned giving cultivation and solicitation, as well as additional major gift prospects.
5. Work with the UUA's program staff and executive team to identify projects for specific support, identify prospects and solicit gifts. Support program staff/executive team members' ability to successfully interact with donors.
6. Ensure full redemption of all pledges.
7. In coordination with the Campaign Manager, establish and ensure appropriate and meaningful donor recognition and manage the stewardship process for individuals within the assigned portfolio, including preparing gift agreements and acknowledgments.
8. Ensure ethical handling of confidential donor and prospect information.
9. Communicate with donors (in person) that resources have been used as intended and share results of donor investments, including presenting the Annual Report or other relevant information to donors within assigned portfolio.
10. Allocate work time and travel resources for greatest return on investment among the active major gift donors and prospects within the assigned portfolio.
11. Stay informed about fundraising trends and issues as well as UUA gift policies and gift planning options, and UUA-specific events and programs to be used to steward and cultivate major gift donors and prospects.
12. Assist in planning and executing cultivation and stewardship events and act as the UUA representative at these events as assigned.
13. Track prospect/donor contacts and other metrics as assigned.
14. Perform other duties as requested by supervisor, the Vice President or Associate Vice President of Stewardship and Development, the Executive Vice President, or the President.

Requirements

- Candidate must be passionate about advancing Unitarian Universalism and the programs of the UUA.
- Bachelor's degree and 3-5 years of development or applicable sales experience, including experience with direct solicitations and a proven record of closing gifts.
- Demonstrated ability to promote and successfully solicit gifts by identifying major gift prospects, managing caseload, designing and implementing creative cultivation and solicitation strategies, and ensuring follow-up activities and stewardship; Ability to form strong relationships with donors and prospects.
- Ability to take direction, act independently, set priorities, balance demands of multiple tasks, and meet deadlines.

- Knowledge of basic finance and accounting principles.
- Results oriented and committed to departmental goals with a high degree of initiative to motivate high-level donors and volunteers.
- Proficiency with Microsoft Windows, Word, and Excel. Working knowledge of applicable software applications, including donor databases (Raiser's Edge, preferred).
- Excellent verbal, written and interpersonal communication skills; the ability to interact with a variety of individuals and audiences.
- Strong time-management and organizational skills.
- Demonstrated ability to work as a member of a team.
- Capital campaign experience a plus
- Basic knowledge of planned giving vehicles and endowment initiatives a plus.
- Willingness to travel about 50% of the time and engage in weekend and evening work.

Please submit your salary expectations with your résumé. People with disabilities, people of color, Hispanic/Latino/Latina and B/G/L/T/I/Q/Q candidates are encouraged to apply. Send cover letter and résumé—indicating “Gift Officer” in the subject line—via e-mail to clynch@uua.org, via fax to (617) 725-4979, or to Catherine Lynch, UUA, 25 Beacon Street, Boston, MA 02108. E-mail submissions preferred.

About the UUA: The Unitarian Universalist Association is an historic, progressive, religious denomination located on Boston's Beacon Hill. Our faith community of more than 1,000 self-governing congregations brings to the world a vision of religious freedom, tolerance, and social justice. Our normal workweek is 35 hours, we pay 80% contribution towards health insurance premiums, 11% towards retirement (after 1 year), and have generous paid time-off policies. We are a great place to work and are seeking to increase the diversity of our staff. The UUA is an Equal Opportunity Employer. For more information on the UUA, visit us online at UUA.org.