



POSITION: MAJOR GIFTS OFFICER
CLASSIFICATION/FLSA: FULL-TIME/NON-EXEMPT

Upward Bound House (UBH) seeks a self-directed individual, with a proven track record of stewarding long-term relationships and securing financial resources for an organization to be its Major Gifts Officer (MGO). This position's purpose is to secure funds for the organization by managing a group of assigned, qualified donors (caseload/portfolio) assuring that as many as possible are retained as continuing donors to the organization and are upgraded in their giving and involvement. The benefit of this position will be the satisfaction of helping donors fulfill their passions and interests through their giving to UBH. The MGO will work collaboratively with and in support of other development, program and finance staff to cultivate and solicit donors. The MGO will report to the Executive Director and directly work collaboratively and strategically with the UBH Board of Directors to fulfill this position's purpose.

RESPONSIBILITIES

- 1) Qualify a group of caseload donors that represent the highest giving potential for the organization.
- 2) Create individual goals for each person on his or her caseload based on the donor's history of giving and the organization's knowledge of that donor's potential.
- 3) Create a plan for each donor that will serve as a foundational communication and marketing plan for each person on the caseload. Will faithfully and on a timely basis execute that plan so individuals on the caseload are retained and upgraded.
- 4) Work with program and the communications staff to secure appropriate project information, including budgets, and create offers, proposals and asks that will be used with persons on the caseload to secure gifts.
- 5) Manage a comprehensive cultivation tracking system in donor database for all major and planned gift donors and prospects.
- 6) Create monthly reports as required by management that accurately reflect caseload activity and performance.
- 7) Plan special cultivation and fundraising events for major donors.
- 8) Manage Board fundraising and collaborate with Board in execution of aforementioned duties.
- 9) Perform other major donor activities as may be required.

QUALIFICATIONS

- 1) Bachelor's Degree required, Masters preferred.
- 2) Five to seven years' successful experience in major or planned gift fundraising preferably in social services.
- 3) Ability to understand the needs and interests of leadership and major gift donors in order to develop relationships between them and UBH.
- 4) Strong sales orientation, proven ability to prospect as well as close funding opportunities.
- 5) Successful experience in making cold calls as well as developing cultivation and solicitation strategies.

- 6) Must have excellent interpersonal skills and a demonstrated record of completing assignments.
- 7) A willingness and excitement to work with the Development and Program Teams, Executive Management and Board of Directors.
- 8) Strong strategic thinking skills with an ability to use data to make decisions and to translate strategy to action.
- 9) Excellent communications skills, both oral and written, supported by ability to use technological tools.
- 10) Ability to work effectively with diverse constituencies within the organization and externally including board members, staff and volunteers.
- 11) Must be able to represent UBH independently to potential donors and make compelling asks.
- 12) Knowledge of fundraising software – Salesforce preferred – and Microsoft Office.
- 13) Self-motivated with the ability to work independently and as part of a team and with great energy and persistence. Experience working with diverse constituencies.
- 14) Proven organizational skills including the ability to manage multiple tasks and projects simultaneously and produce high quality results on time.
- 15) Critical thinking, problem solving, accuracy and attention to detail.
- 16) Have a commitment to social justice, housing, and/or homelessness.
- 17) Access to transportation to visit with donors and prospects. Available for occasional work events on weekends and evenings. Willingness to travel locally.
- 18) Willingness to adjust hours to accommodate the needs of the job.

MANDATORY REQUIREMENTS

- Employment eligibility verification
- Current California driver's license and State-required insurance and a driving record acceptable to the organization and/or its insurance carrier
- Reliable transportation
- Successful completion of background screening

TO APPLY

To be considered for a position, email resume to hr@upwardboundhouse.org. Please be sure to reference **Job Title** in the subject line of your email. Due to the volume of resumes received, no calls or faxes regarding submission will be returned. Your resume will only be routed correctly and considered, if all the qualifications are met.