

United Way of Lake County (UWLC)
Position Description

Position Title: Sr. Relationship Manager
Reports To: VP, Resource Development
Status: Regular Full-Time/Salary/Exempt
Supervises: Volunteers/Interns

Purpose of Position:

To maximize annual revenue and donor engagement through workplace campaign and individual donor cultivation and stewardship.

Responsibilities require planning, organizing and performing a variety of duties applying a wide range of procedures and rules. Duties require attention to detail, high degree of accuracy, reliability, timeliness, alertness and use of judgment. This is a professional position that has access to and use of confidential data where security and discretion are of utmost importance.

Primary Responsibilities (% of time for each):

Individual Giving Management (30%)

- Collaborate with leadership giving staff to cultivate and steward leadership donors.
- Build and maintain relationships with individual donors of workplace campaigns.
- Connect employees to UWLC resources such as 2-1-1 and volunteer opportunities.
- Recruit for affinity groups such as Women United and Young Leaders Society.
- Work with UWLC Community Impact to recruit individuals for Day of Caring and as speakers.

Workplace Campaign Management (30% time)

- Build and maintain relationships with Employee Campaign Coordinators (ECC) and other key contacts at workplace campaign accounts.
- Maintain relationships with these individuals before, during and after their campaign.
- Conduct UWLC presentations.
- Ensure giving platforms are meeting corporate partner/donor needs.
- Create campaign and engagement plans.
- Assist and direct corporate partners in the execution of employee giving campaigns and activities.
- Analyze reports that track the entire campaign process.
- Manage seasonal staff supporting fundraising efforts.

Event Participation and Recruitment (10%)

- Participate in UWLC special/volunteer and campaign events.
- Recruit guests for special events and volunteer opportunities.

Reporting and Data Management (10%)

- Update and verify individual/organizational donor data.
- Record donor communications and updates thoroughly and in a timely fashion.
- Participates in Andar Health Check (Andar Data Integrity Plan).
- Process campaign reports for employee payroll, cash, check, credit card and special event pledges.

- Operate as a member of the Resource Development team.
- Follow procedures as they relate to reporting and data management in order to maintain data integrity.

Executive Support (10%)

- Collaborate with Executive Team and Campaign Cabinet volunteers to manage relationships with Chief Executive Officers (CEO) or their representatives.
- Initiate CEO support with specific donors/workplace campaigns.
- Provide support to Executive Team and Campaign Cabinet volunteers on their assigned donors/workplace campaigns.

Community Engagement (5%)

- Maintain a visible profile in the community by developing relationships with organizations that will further promote and enhance UWLC.
- Participate in external (chambers of commerce, non-profit events, etc.) and internal (Women United, Young Leaders, etc.) groups and events.
- Establish and maintain relationships with other United Ways.

2-1-1 Program (5% Time)

- These job responsibilities are to be the main emphasis of this position. As with every position UWLC, it is not possible to define jobs precisely. Should the need exist, every person in the organization will assist in any way necessary to assure an efficient and cooperative environment.

Education and Experience:

- BA or equivalent experience in fund raising, sales, marketing and/or public relations/customer services.
- Non-profit resource development experience desired.
- Fluency in the English, both oral and written, including correct punctuation, spelling and grammatical usage.
- Ability to complete basic math as well as review and interpret spreadsheets, reports and graphs.
- Proficiency in Microsoft Office Suite.
- Experience in Donor Database and/or Customer Relationship Management Systems a plus.
- Proficiency in creating presentations and effective in communicating one-on-one and publicly.
- Ability to function both independently and as a part of the team.
- Ability to relate with a diverse group of individuals.
- Strong customer service/interpersonal skills.
- Well organized with the ability to handle multiple tasks simultaneously.
- Must be available to meet with donors and prospects according to their schedule, often in the early morning, evenings and on limited occasions the weekend.
- Desire to commit to the mission, vision and goals of UWLC.

Dimensions:

Staff supported:	6 plus up to 5 seasonal workers
Campaign purchases:	\$5,000

Performance Measures:

- All checks and cash deposited within 24 hours.
- Database campaign information, communication log, assembled materials, mailings, etc. are accurate.
- Campaign report processing is completed in an accurate and timely fashion.
- Andar protocols and procedures are followed and health check reveals positive results.

Physical Requirements:

While performing the duties of this job, the employee is occasionally required to sit, stand, walk, drive/operate a car, lift and carry bags and boxes of no more than 25 pounds; talk or hear, read, use hands to finger, handle or feel objects, reach with hands and arms; climb stairs, stoop, kneel, or crouch, type, operate a computer, copy machine, fax machine, postage meter, etc.

Must be able to provide own transportation to attend meetings at various locations throughout Lake County. In accordance, must provide proof of a valid driver's license and current automobile insurance.

Reasonable accommodations may be made to enable individuals to perform the essential functions.