



Job Description: Development Manager

Reports to: Executive Director

JOB SUMMARY

This position is an opportunity to join a team that is delivering meaningful help to people across the United States, that gets consistently positive reviews and is supported by a national network of partners and volunteers. United Policyholders is a dynamic non-profit consumer organization based in the Bay Area that problem-solves and advocates for people and businesses across the United States in connection with insurance, climate change and disaster recovery. Work remotely and in our office located in the popular San Francisco Inner Sunset area.

The Development Manager works closely with the Executive Director, Board of Directors, staff and volunteers to successfully implement the organization's fundraising and marketing initiatives. This position is responsible for activities related to foundation grants, major, corporate and individual gifts, a professional sponsor program, development-related communications, fundraising events, and board engagement. Team UP is a diverse group that includes public officials, attorneys, disaster survivors and personal finance and construction professionals.

GENERAL RESPONSIBILITIES

The following duties and responsibilities are the essential functions of this position. Other duties and responsibilities may be assigned as needed. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

General Development Duties

- Implement tasks and strategic initiatives for securing grants, major gifts, corporate, foundation and individual gifts and executing fundraising/cultivation events
- Work with UP Bookkeeper to ensure revenue is properly recorded and expenses related to grants are drawn down appropriately
- Work with Deputy Executive Director and Bookkeeper to track grant expenditures, and ensure alignment with grant requirements
- Manage prospect research and cultivation initiatives
- Oversee fundraising database and tracking systems
- Ensure accurate and timely execution of thank-yous, invoices, certificates and donor, sponsor and grantor acknowledgements
- Engage with prospective sponsors and funders at conferences and events

Grants

- Research and identify grant opportunities, prepare, write, and submit grant proposals and budgets for disaster-recovery related, preparedness, advocacy, and general operating grants

- Build relationships and support Senior Staff in maintaining and developing relationships with donors and grantors
- Maintain a grant reporting calendar and manage the full life cycle of each grant
- Track metrics/statistics, solicit stories/photographs/quotes as required by funders, and prepare, write, and submit reports to grant funders

Professional Sponsor Program

- Coordinate with Senior Staff to oversee and administer an annual donation program through which professionals and businesses support the organization and are featured in a “Find Help” directory that individual consumers use to locate qualified help

Fundraising Events

- Primary responsibility for the organization’s fundraising and donor recognition events
- Work w/Communications team to create print and digital outreach and marketing materials for fundraising events

Major Gifts/Individual and Corporate Giving Campaign

- Work with Executive Director and BOD to cultivate major gifts
- Develop and maintain ongoing relationships with major donors
- Develop strategies to effectively move existing donors through a meaningful cycle of giving
- Coordinate the organization’s Year End giving campaign

Communications

- Create digital and print media to support fundraising throughout the year including disaster-specific campaigns
- Draft fundraising solicitations, messages of gratitude, accomplishment reports and related content for print, digital, broadcast and social media.

Board Relations

- Work w/BOD members on fundraising strategies and execution
- Prepare materials for and manage quarterly Board meetings
- Support Board Events Committee meetings
- Coordinate with Executive Director to build and administer an Advisory Board/Panel

Perform additional duties as assigned.

INTERACTION

This position will interact closely with the Senior Staff, the Board of Directors, and other UP staff.

WORK SCHEDULE

United Policyholders services are in high demand and the work is fast-paced, but we value a healthy work-life balance for our team.

- Full-time 40 hours per week; primarily scheduled Monday – Friday with occasional evenings and weekends preferred, 32 hour (80%) work week will be considered.
- Remote and in-person as needed

- Travel as needed

SUPERVISORY RESPONSIBILITIES

This position is responsible for supervising staff

EDUCATION/YEARS EXPERIENCE

Bachelor of Arts Degree required. Four or more years of non-profit fundraising experience required

SALARY RANGE: \$90,000-\$120,000 depending on experience

WHAT WE OFFER:

- **Mission-driven work.** Our work has a direct impact on millions of consumers grappling with insurance and disaster-related issues. You will see and feel the impact of your work on a daily basis
- **Benefits.** Health, dental, eye insurance, 16 paid holidays, an employer-sponsored 403b retirement savings option
- **Flexible work schedule.** We pride ourselves on offering a supportive and flexible working environment. You'll have the autonomy to create a schedule that brings your best work
- **Strong and healthy culture.** A working environment that values empathy, humility, integrity, inclusion, professional growth, learning, humor and diverse perspectives
- **Talented and dedicated team.** A collaborative, hard-working, national team that shares a passion for empowering and improving the lives of the people we serve

KNOWLEDGE, SKILLS AND ABILITIES

- Display professional conduct at all times
- Must have superb verbal, written, spelling and grammar skills
- Demonstrated experience managing multiple deadlines and working effectively under pressure, using common sense and independent judgment to produce quality work under time constraints
- Demonstrated experience working with and motivating staff, board members, and volunteers
- Have knowledge and experience in fundraising techniques and drive to get out of the office and build external relationships that will benefit the agency's fundraising goals
- Experience working to and exceeding target goals
- Be organized and exhibit "follow through" on tasks and goals
- Advanced knowledge of Safari operating systems as well as Microsoft Office applications, Salesforce, Constant Contact, and WordPress
- Be a self-starter and goal driven to initiate donor visits and fundraising calls
- Work with spirit of enthusiasm, teamwork, cooperation and a sense of urgency
- Maintain a high degree of confidentiality over all matters in the course of business operations
- Ability to multi-task in an efficient, thorough, and prioritized manner
- Ability to work quickly, accurately and independently

LICENSES/CERTIFICATIONS

Must have reliable transportation and possess and maintain a valid California driver's license including proof of personal vehicle insurance coverage and insurability under the Company's insurance carrier standards.