

## United Way of Greater Chattanooga Job Description

**POSITION TITLE:** RELATIONSHIP MANAGER

**FLSA CLASSIFICATION:** Full-time/Exempt

**DEPARTMENT:** Corporate Engagement

**REPORTS TO:** Director of Workforce Engagement

**POSITION PURPOSE:** To generate resources, support and buy-in from corporate partners as we sell impact and community initiatives through year-round engagement.

**This is a sales position.** We at the United Way are in the business of selling impact to our corporate partners, partner agencies and the community.

### KEY RESPONSIBILITY AREA - FUNDRAISING AND RELATIONSHIP MANAGEMENT

Specific Duties:

- Work with the Dir. of Workforce Engagement to recommend annual fundraising goals for each unit.
- Meet or exceed the annual campaign goal within assigned unit(s)
- Must be able to speak, explain and educate corporate partners on **Salesforce Philanthropy Cloud** and **Digital Services** and gain interest for presentations and proposals
- Within assigned accounts, ensure every CEO is contacted by an appropriate volunteer & is accompanied by the staff member.
- Within assigned accounts ensure each employee meeting is staffed by a United Way employee or Loaned Executive, has top management representation, a recipient speaker and/or a speaker from the UW Speakers Bureau, and approved marketing messages are effectively presented.
- Manage and maintain **effective fundraising techniques** for assigned accounts by setting goals, objectives and implementing customized strategies.
- **Being proactive** with steering corporate partners with a **consultative approach** and ensuring companies understand recommendations given
- Ensure that **all marketing materials**, strategies and information needed for companies is **pre-planned and arranged at least 4 weeks** prior to start of campaign
- Being proactive with **scheduling leadership, executive and/or officer meetings** with appropriate corporate volunteer and notifying UW executive 2 weeks in advance of event
- Developing and implementing a suite of services for the assigned book of business while using the **practice of segmentation**
- **Take ownership** (develop, create and process) of all forms, letters and other pertinent items related to campaigns and corporate donors within unit(s)
- Build relationships with key personnel in all accounts and with campaign volunteers
- Ensure **notes are kept in real time** related to each account and be able to demonstrate follow-up on concerns, areas for improvement, etc. for each account.
- Ensure **Corporate Social Responsibility plans** are developed and initiated for the top companies within each unit. 8-10 touchpoints (i.e. visits, lunch and learn, Newsletter, etc.) within Top 100 companies, 3-5 touchpoints outside of Top 100

### KEY RESPONSIBILITY AREA - DATA MANAGEMENT

Specific Duties:

- Maintain core competencies in the ANDAR fundraising system including how to obtain reports, track data and update account information
- Ensuring that the **Campaign Performance Report is updated weekly**

- Maintain an organized history of each unit strategy, volunteer participation, unit results and analysis; verify campaign staff do the same
- Ensure that **all data** from campaign is **correctly entered and maintained** in the ANDAR system.
- Ensure current reports are summarized for volunteers on a regular basis

### KEY RESPONSIBILITY AREA - VOLUNTEER MANAGEMENT

Specific Duties:

- Train Company Coordinators to identify opportunities to reach objectives
- **Supervise** Loaned Executives within assigned units and **own** Loaned Executive training.
- Attend all LE Training Sessions.
- Campaign staff are to **manage assigned LE s' assignments, activities, & results.**
- Provide **consistent communication** to volunteers in companies and those working for the campaign cabinet (i.e. Unit Chairs)

### KEY RESPONSIBLITIY AREA - EVALUATION/CONSTANT IMPROVEMENT

Specific Duties:

- Participate in the **annual campaign analysis (CAN-DO) each year**; provide a summary to the CEO; also, to staff and volunteers, as requested
- **Make recommendations** for improvements in future campaigns and ensure recommended improvements are implemented in all accounts assigned to campaign staff
- Annually **obtain and record feedback from company** representatives regarding their campaign and address these concerns for the following year.
- Must have a **minimum of 3 specific goals** for each company that **specifically identifies areas that need improvement** for their campaign

**Other Duties as Assigned...**

### MINIMAL JOB REQUIREMENTS

**Education:** B. A. or B. S.; Master's Degree preferred

**Experience:** A minimum of three years of **fundraising/sales required**

- Fundraising and non-profit team experience
- Ability to **produce increase financial results** year to year
- Ability to meet financial goals and account development requirements
- Experience working with community volunteers
- Knowledge of techniques and practices for fundraising, marketing , and management, experience in training and public relations and broad experience working in the community with volunteers
- Self-starter with **good interpersonal and proven communication skills**, including writing; also excellent presentation skills
- Experience in analyzing and understanding statistical and financial reports
- Extremely motivated, **flexible and must have a team-first attitude and approach**
- Strong Microsoft Office skills

If you are interested in applying for this position, please submit your application, cover letter and resume to Tammy McCallie at [tammymccallie@uwchatt.org](mailto:tammymccallie@uwchatt.org).