



**ORANGE COUNTY UNITED WAY
JOB DESCRIPTION**

JOB TITLE: DIRECTOR, PHILANTHROPY OPERATIONS	REPORTING TO: CHIEF PHILANTHROPY OFFICER
DEPARTMENT: PHILANTHROPY	POSITION: FULL-TIME/EXEMPT

Purpose of Position

The Director, Philanthropy Operations plays a critical leadership role in advancing the organization's fundraising and campaign goals. This position provides strategic oversight of the core infrastructure that enables revenue generation, including systems governance, prospect/portfolio support, reporting requirements, and operational standards.

The Director ensures that all philanthropy operations align with best practices, are data-informed, and support a high-performing fundraising team.

This role is responsible for optimizing systems and processes that drive donor engagement, portfolio development, and campaign success. The Director will also manage cross-functional collaboration with Finance, Marketing, and other partners, both internal and external to ensure seamless execution of fundraising strategies and donor experiences.

Key Duties and Responsibilities

- **Strategic Operations & Revenue Enablement**
 - Ensure that the philanthropy department has effective and appropriate donor analytics, dashboards, and reports to support fundraising success and revenue growth.
 - Maintain a standardized, user-friendly reporting system for internal stakeholders.
 - Monitor and disseminate key fundraising metrics and donor insights to the philanthropy team and leadership with emphasis on accountabilities, performance against goals, and pipeline health.
- **Data & Systems Management**
 - Ensure the integrity, security, and performance of the donor database through regular audits, hygiene protocols, and process enforcement.
 - Help recommend and coordinate system upgrades and enhancements to support evolving fundraising needs.
 - Ensure operational standards are adhered to, and that we consistently provide accurate and timely gift processing, acknowledgments, and pledge reminders, 48-hour turnaround standard.
- **Prospect & Portfolio Management**
 - Identify and assign new donor prospects to appropriate portfolios and campaigns.
 - Develop and maintain robust donor pipelines and support the conversion and upgrading of donors.



- Provide tools and tracking systems to help frontline fundraisers monitor progress toward goals and optimize portfolios.
- **Research & Stewardship**
 - Oversee the creation of comprehensive donor and prospect research profiles and biographies.
 - Ensure all research materials are documented, confidential, and integrated into the database.
 - Collaborate with the Chief Philanthropy Officer and Marketing team to develop stewardship materials and donor communications.
- **Campaign Support**
 - Coordinate with designated administrative support to ensure scheduling, materials preparation, and donor meeting logistics are covered.
 - Assist in proposal development and packaging for major donor solicitations.
- **Administrative & Event Coordination**
 - Assist in the staffing of The OC Way Campaign Cabinet by helping to prepare for meetings and attending meetings.
 - Provide high-level administrative support to the philanthropy team when needed as a back-up to the administrative assistant, including scheduling, materials preparation, and donor meeting logistics.
 - Provide support/backup support for donor events, including salons and cultivation gatherings, occasionally requiring local travel and after-hours availability.
- **Budget & Financial Reconciliation**
 - Develop and manage the departmental budget, including forecasting, tracking, and reporting.
 - Partner with the Finance department to ensure accurate reconciliation of donor and gift data.

Job Requirements / Technical Knowledge

- Bachelor's degree in a relevant field required; advanced degree or CFRE certification a plus.
- Minimum of 8 years of progressive experience in fundraising operations, including annual giving, donor database management, prospect research, and pipeline development.
- Proven experience in project management, with a strong track record of delivering complex print and digital campaigns.
- High proficiency in Microsoft Office Suite (Excel, Word, Outlook, PowerPoint) and donor CRM systems; experience with relational databases required.
- Exceptional written, verbal, and interpersonal communication skills.
- Strong organizational skills, attention to detail, and ability to manage multiple priorities.
- Demonstrated ability to maintain confidentiality and uphold ethical standards.
- Experience coordinating with high-level donors, volunteers, and executives.
- Agency experience and familiarity with marketing and publication processes preferred.
- Reliable transportation and clean driving record required.



Compensation

- Commensurate with experience, education, and market, \$90,000-\$120,000. Competitive benefits.

Core Competencies

- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **Interpersonal Skills** - Maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly and persuasively in positive or negative situations; listens and obtains clarification; responds well to questions; participates in meetings.
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.
- **Teamwork** - Exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests.
- **Professionalism** - Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration, regardless of status or position; accepts responsibility for own actions; follows through on commitments.
- **Language Skills** - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

Company Standards

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations. Willing to embrace change and new technologies. Commitment to the values and mission of Orange County United Way.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 25 pounds.



Send Cover Letter and Resume To:

recruiting@unitedwayoc.org

Orange County United Way

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