



Candidate Search and Placement is being led by [The Stott Group](#).

## **POSITION PROFILE – PRINCIPAL GIFTS OFFICER**

Upstream USA is a fast-growing, national nonprofit working to expand opportunity by reducing unplanned pregnancy across the U.S. We envision a future where patient-centered contraceptive care is an integral part of primary care in all settings, for all people. In this future, patients are screened for their contraceptive needs; are offered patient-centered contraceptive counseling, free from bias and coercion, provided by knowledgeable providers and support staff following evidence-based guidelines; and can receive any contraceptive method of their choosing, during the same visit if they want, without logistical barriers. Upstream's work empowers patients to decide if and when they want to become pregnant, a critical step towards improving maternal health, as well as positive outcomes for parents, children, and their families.

Upstream's team has created an organizational culture dedicated to the communities we serve and the vision of the organization. The rapidly changing landscape in which we conduct our work requires our team to create solutions in a dynamic and fast-paced environment.

### **JOB HIGHLIGHT**

You will advance relationships with major investors (donors contributing \$1M+ annually) in Upstream's mission through compelling content and experiences. You will leverage your strategic relationship management skills to create opportunities to expand networks and engage new audiences.

### **JOB SUMMARY**

As The Principal Gifts Officer, you will advance investor relationships by managing a robust and engaged principal gift-level investor pool that includes national philanthropists and funders contributing seven- and eight-figure gifts annually. This will include implementing (with the VP and CEO as primary relationship owners) the strategy for and process of donor cultivation, solicitation, and investor engagement.

Leveraging your background in strategic relationship management, you will lead principal investor relationship management and produce sophisticated, executive communications and content for a principal investor audience. While you will produce content in coordination with key colleagues, you will own project management of all content and communications for your portfolio. Reporting to the Sr. Director, Investor Engagement, this role will closely collaborate with the Vice President of Development & External Affairs.

Your ability to develop and execute compelling content and experiences for investment-minded philanthropists and your analytic perspective combined with strong relationship management instincts and excellent attention to detail will ensure your success in this role.

## **YOU WILL BE RESPONSIBLE FOR...**

- Collaborating with the CEO, VP for Development & External Affairs, and Sr. Director, Investor Engagement on strategy and execution for a portfolio of ~25 principal gift-level investors and prospects (\$1M+).
- Proactively advancing relationships through the cultivation, solicitation, and stewardship stages by project managing the strategy execution for portfolio's investors/prospects, serving in a secondary relationship manager role to the CEO and/or VP.
- Deep knowledge of and comfortability with high-impact philanthropists and change-making philanthropic organizations and funding models.
- Attending and participating in investor/prospect meetings with the CEO and/or VP as determined.
- Managing relationships with key members of investors'/prospects' philanthropic/foundation teams to ensure deep engagement across the entities.
- Ensuring timely communication on behalf of the CEO and VP to investors/prospects.
- Leading all preparation and follow-up for investor/prospect meetings, including writing briefing materials, facilitating briefing meetings, developing meeting plans, coordinating any written materials for the investors/prospects, ensuring timely follow-up post-meetings, and coordinating next steps in the engagement strategy to move relationships forward.
- Directing the development of investor-centered content and communication for investors/prospects in their portfolio, including talking points, presentation decks, grant proposals and reports, correspondence, etc., often collaborating with the Sr. Specialist of Principal Gifts & Board and the Sr. Manager of Investor Communications.
- Ensuring that all relevant notes, minutes, and next steps for funder engagement and stewardship of top-tier investors are captured and communicated, as appropriate, with internal and external parties.
- Collaborating with the Principal Gift team and Sr. Manager of Investor Communications to develop investor communications strategy.
- Participating in developing the strategy for in-person convenings, meetings, and events with high-level philanthropists.

## **YOU MUST HAVE...**

- 8+ years of fundraising and relationship management experience (development, political fundraising, philanthropy, for-profit investor relations, or similar) with increasing levels of responsibility.
- Experience managing a portfolio of ultra-high-net-worth individuals utilizing metrics, systems, and relationship building skills to maximize strategic cultivation, solicitation and stewardship of \$1M+ gifts or investments.
- Exceptional written and verbal communication with capability of distilling complex content for sophisticated audiences into a variety of formats (such as talking points, presentation decks, grant proposals and reports, correspondence).

- Exceptional project management ability with skill and confidence in managing up and sideways on multiple competing and evolving priorities.
- Understanding of relationship management processes, pipelines, fundraising reporting, and tracking mechanisms within a CRM environment.
- Proficiency with Salesforce, Google and Microsoft Suites.
- Commitment to Upstream's mission and to mission-driven work in general.

## YOU WILL BE SUCCESSFUL IF...

- **You are People Oriented:** You cultivate strong, meaningful relationships and can activate networks. You know how to manage internal stakeholder relationships and can optimize an opportunity to build relationships.
- **You Recognize Opportunity:** You know which philanthropists are changing the game and ensure your industry acumen is as sharp as possible, deploying your insights in situations and contexts where the team can see the highest ROI.
- **You are Cool Under Pressure:** You are even-keeled and can maintain composure when unexpected challenges arise. Your savvy and sophisticated responses to the unexpected put stakeholders at ease even in high-pressure situations.
- **You are an Exceptional Communicator:** You present the organization's vision with clarity and thoughtful gravitas. You are a great listener, contextualizing information and data to help an investor understand the organization's vision.
- **You Manage Methodically:** You manage your investor portfolio with precision, gaining energy from strategizing touchpoints that run from simple to complex. Your bias is to action and conversation.
- **Ideal Attributes:** You have demonstrated your ability to operate with a high degree of urgency, self-motivation, focus, and commitment to high-quality work. You are equally as comfortable behind the scenes as you are with external audiences. You are a team player, and approach your work with humor, attention to detail, and discretion. You actively seek feedback and can provide constructive, positive feedback to others.

## LOCATION

Upstream is headquartered in Boston, MA. This role has the option to be remote.

## COVID-19 VACCINE POLICY

Upstream USA's COVID-19 Vaccine Policy requires employees to have completed a COVID-19 vaccine primary series unless a medical or religious exemption is approved. As a condition of employment, newly hired employees must provide proof of their COVID-19 vaccination or, if applicable, request a medical or religious exemption.

## TRAVEL REQUIREMENTS

All Upstreamers must also be able to attend work-related in-person meetings and functions as needed. We gather for moments that matter for training, teaming and connection. Our teams

come together for occasional in person meetings and organizational retreats. As part of our hybrid work practices, this travel expectation will be applicable for all Upstreamers, even those based remotely.

This role will require up to 40% of business travel (dependent on whether the applicant is in Boston, MA). All Upstreamers can expect a minimum of 8 days of business travel per year to attend two annual organizational retreats. Members of the Development and External Affairs team will also be expected to be in person in Boston for 2 days each quarter.

## **HYBRID WORK REQUIREMENTS**

In our hybrid work environments, there is a basic expectation that our Upstreamers will ensure that their work from home setups will have reliable access to phone and Internet to ensure connectivity to their teams.

## **BENEFITS**

Upstream USA offers a comprehensive benefit package including medical, dental, vision, life insurance, long and short term disability, 401K with a match, generous vacation, personal, sick and holiday time off, parental leave, professional development, a fitness and cell phone allowance for all full time employees and part time employees who work a minimum of 24 hours per week.

## **HIRING RANGE**

The hiring range for this role is \$89,420 to \$125,000. Final offers for this position will be based upon several factors including the scope of the role, market compensation analysis, position requirements, candidate's experience level and capabilities, specific candidate geographic location, internal pay equity considerations and will be made within the parameters of Upstream USA's compensation framework and philosophy.

## **UPSTREAM CAREERS**

At Upstream, we embrace diversity. We nurture it and we thrive on it because it benefits our organization, our partners, and our community. Our goal is to attract, develop and retain exceptional people, and to create a work environment that is dynamic, rewarding and enables each of us to realize our potential. Upstream is committed to equal employment opportunity regardless of race, color, ancestry, religion, sex, national origin, sexual orientation, age, citizenship, marital status, disability, genetic information, gender identity or Veteran status. We also consider qualified applicants regardless of criminal histories, consistent with legal requirements. If you have a disability or special need that requires accommodation, please let us know. [Learn more](#) about [working at Upstream, our values](#), and our commitment to [Equity, Diversity and Inclusion](#). Upstream USA participates in E-Verify.

## **TO APPLY**

Applicants are strongly encouraged to email a resume and cover letter to Abbey Voelker at the Stott Group at [Upstream@thestottgroup.com](mailto:Upstream@thestottgroup.com) with "Principal Gifts Officer" as the subject of the email. Please be advised that writing samples may be requested throughout the hiring process.