



# UPWELL

PROTECTING TURTLES AT SEA

## GRANTS OFFICER

**Position Description:** The Grants Officer leads fundraising with institutional donors (foundations, corporations, government agencies, *etc.*) by managing all stages of the grants pipeline from letter of inquiry to proposal to interim report and final report and liaising with project leaders to track completion of milestones at key intervals. S/he also assists the Executive Director with major donor cultivation and works with the Office Manager to ensure timely processing and recognition of all gifts. The Grants Officer must be knowledgeable about Upwell's methods, programs and mission, manage multiple projects simultaneously and complete submissions in accordance with internal and external deadlines. Working in a start-up environment, this position presents excellent opportunities to engage new funding sources and pursue visionary strategies--but it also requires nimble thinking and serious multi-tasking encompassing donor cultivation and stewardship, public and private fundraising, and grant writing, management and reporting.

### Job Duties:

- Creates fundraising plan to fulfill programmatic needs and to achieve long-term financial sustainability in support of the organizational mission.
- Identifies public and private funding leads, sets realistic deadlines, adds deadlines to the organizational calendar, invites contributions by appropriate team members, manages a timeline and ensures timely submissions.
- Researches funder prospects (by phone and Internet to understand their interests, requirements and deadlines), organizes leads and sets priorities from a list of 350+ potential leads, building on this list with new leads, information and contacts.
- Manages a portfolio of 20-30 corporate, individual and foundation donors, writing 15 letters of intent and 10 proposals to raise \$200,000 or more from new funders in first six months.
- Distills complex scientific concepts and reports into appropriate language for target audiences.
- Writes, edits and formats general and customized concept papers, letters of inquiry, proposals, reports, case statements, fact sheets and marketing materials.
- Coordinates with appropriate staff members to design project proposals, assisting on proposals they develop.
- Organizes collaborating partners if the project involves outside organizations.
- Tracks and completes all grant-related administrative operations.
- Liaises with project leaders to ensure completion of all milestones within grant period.
- Ensures grant reports and donor communications are delivered on time with high quality and accuracy.
- Develops strategies and materials for donor cultivation, stewardship and solicitation, including program reports, annual reports, holiday cards, donor emails, ongoing renewals, special appeals and pledges.
- Creates and manages planned giving program, special campaigns, annual giving program, ongoing donor solicitation and stewardship efforts.

- Spearheads direct mail campaigns and manages production of print materials for all solicitation and cultivation mailings.
- Drafts custom appeals and reviews materials to integrate fundraising into broader organizational communications and outreach, including on website and social media.
- Makes certain that donors receive proper documentation and recognition commensurate with their contributions.
- Plans and manages all aspects of donor events and trips, including budgeting, invitation production/ mailing, pre- and post- event calls/emails to donors, and expenses.
- Sets up and uses donor database to maintain donor files and records, update donor information, coordinate mail merges, produce reports, perform analysis, and track and cultivate donors.
- Writes up protocols and procedures describing key aspects of CRM database management and conducts audits of development database procedures every 6 months to ensure that procedures are streamlined and updated.
- Measures and reports on fundraising performance, making course corrections as necessary.
- Models an ethos of gratitude and an ethic of efficiency in all correspondence.

**Desired Background:**

- University degree or equivalent
- Five years of non-profit grantwriting/development/fundraising experience
- Experience managing and tracking multiple prospects and donors, developing proposals of \$25,000+ and maintaining long-term relationships with fundraising constituents
- Spectacular writing and proofreading skills, attention to detail and ability to manage multiple leads on tight deadlines
- Proficient computer skills (including Microsoft Office and Google Drive) and design abilities to create compelling, professional collateral
- Excellent customer service, exemplary written/oral communications skills and generally congenial manner with attention to politeness and etiquette
- Demonstrated ability to successfully develop and implement complex projects in an unstructured environment
- Proactive, self-motivated and able to complete assigned tasks independently, collaborating with team members for remote or in-person updates and meetings on a weekly basis
- Background in marine science or conservation a plus

**Reports to:** Executive Director on all grants and fundraising; works closely with Office Manager on communications, CRM and correspondence.

**Location:** Monterey, CA. May work remotely but must be available to meet in Monterey at least once per week.

**Compensation:** Salary commensurate with experience; range \$55,000 - \$70,000 for full-time position. Opportunities available for flexible scheduling.

Upwell is an equal opportunity employer, celebrating diversity and seeking to create an inclusive environment for all employees.

**To Apply:** Send resume and cover letter to Dr. Kristin Reed, Operations Director, at [kristin@upwell.org](mailto:kristin@upwell.org)