FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title:	Board & Relationship Specialist	Division/Department:	Philanthropic Advancement
Reporting To:	Vice President & Director, Investment Portfolio Oversight & Reporting; and Vice President, Philanthropic Advancement		

FLSA Classification:	☐	Exempt	x	Non-Exempt				
Employment Type:	x	Full Time	☐	Part Time	☐	Intern	☐	Contract

Position Summary

The Board and Relationship Specialist provides direct client and project support to the Philanthropic Advancement professional team, specifically focusing on the Investments department and the professional team serving institutional/nonprofit clients. The direct client support includes coordination and preparation for meetings with clients and prospective clients (calendaring, communication, materials and follow up) in direct service to the Relationship Managers. The support for the Investments department includes support and coordination of financial reports, presentations, and investment materials shared with FFTC clients, senior leadership and volunteer Boards and Committees.

In addition to the broad client support, this position will be the lead support function for a portfolio of significant FFTC Boards and select clients, including FFTC's Investment Committee and several large institutional clients organized as supporting organizations of FFTC. This board support includes the facilitation of governance, legal, accounting, and administrative responsibilities, and coordination/execution of annual service contracts for applicable clients.

The Specialist plays a key role on the Philanthropic Advancement Team by supporting programming and events, particularly those connected with investments, corporate philanthropy and nonprofit services.

This position requires a strong command of financial and investment language and concepts, high attention to detail, and strong relationship skills. The position will be supporting a number of professional team members and as such, must be organized, a self-starter and adept at prioritizing and executing a variety of responsibilities.

Duties & Responsibilities

Relationship Management Support

- Serve as contact for client relationships of FFTC – receiving calls, answering questions, sending packets and routing inquiries to the appropriate contacts internally
- Support relationship managers in client inquiries, troubleshooting and basic customer service; serve as a point of contact for select clients in support of relationship managers
- Collaborate with the Donor Relations team to hand off client servicing issues or to take a more active role in interacting with the donors, as appropriate
- Assist with the preparation for prospect meetings and annual philanthropic reviews with assigned clients in support of Relationship Managers (preparing PowerPoints, relationship summaries, fund statements and investment performance)
- Engage with Philanthropic Advancement team to create and execute a robust calendar of events

- Work with Philanthropic Advancement and Marketing/Communications teams to identify and capture fundholder stories and other FFTC initiatives
- Support the team to identify, prioritize and execute calling strategies for clients and prospects, as requested
- Provide administrative and project support to the supervisors (expense reports, calendaring)
- Prepare spreadsheets, presentations, forms and other documentation for review and signature as needed

Investment Team Support

- Coordinate regular review, update and dissemination of investment materials for client use including one-on-one meetings, website or group settings
- Monthly and quarterly financial report generation and analysis (as needed) including Financial Edge reports and updating marketing investment collateral
- Assist in creation and dissemination of client facing updates regarding the investment portfolios (i.e. new pool options, fee changes, or interim reporting)
- Coordinate and execute regular investment webinars for FFTC client base, and client programming for institutional /nonprofit client group
- Direct interface with FFTC investment consultant, Mercer, for specific client contracts, reporting inquiries and regular reporting responsibilities, investment webinars and calendaring for client and committee meetings
- Support for investment team for contract and compliance document review and execution for FFTC and related entities
- Create standard monthly PowerPoint slides and reports regarding investment performance

Board Management Support

- Provide lead support function for FFTC Investment Committee, and key client boards and committees, including the Greater Charlotte Cultural Trust, Queens University of Charlotte Endowment and the Foundation For the Mint Museum (all organized as supporting organizations of FFTC), and others as assigned
- Board support includes scheduling board and planning meetings, preparing materials, meeting setup and breakdown (including catering needs), taking minutes, tracking governance and other requirements, orienting and onboarding new members, database entry, and monitoring of annual compliance, accounting or investment requirements.
- Preparation of meeting materials to include agendas, board packets, community updates, investment reports
- Track and manage matters related to governance, legal, & accounting requirements to include coordination of compliance requirements & new board member training
- Interact directly with key clients, client representatives and volunteer leadership

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

JOB QUALIFICATIONS

Education and Experience:

- 5-7 years of professional experience
- Experience in the investments or financial sector is preferred
- Graduate of a four-year college or university
- Database management skills/ previous experience managing database

- Excellent communication skills, both oral and written
- Customer service orientation and experience

Skills and Abilities:

- Excellent computer skills including detailed knowledge of all Microsoft Office applications (Word, Excel, PowerPoint and Teams)
- Experience with Blackbaud (Raisers Edge, Granted Edge, and Financial Edge)
- Extremely organized and detail-oriented
- Initiator who is a self-starter, but flexible and team-oriented
- Strong interpersonal skills to develop and maintain productive communications with constituents/ clients and productive working relationships with other Team members, administrators and staff
- Interest in working for a fast-paced, growing and changing nonprofit organization
- Ability to read, analyze and interpret general business correspondence
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods and ability to occasionally move about to accomplish tasks or move from one worksite and/or workstation to another

Position Specific Competencies

Select from the following position-specific competencies. Please limit the total number of competencies to 7 or less.

All Employees:	x	Communication & Interpersonal Skills				
Executive Team:		Leadership		Strategic Thinking		Fiscal Stewardship
All Supervisors:		Delegating Responsibility & Empowering Employees		Managing Employee Performance		Ensures Consistent Policies & Practices

General:

	Affiliate Management		Budgeting & Cost Awareness		Building Organizational Commitment
	Building Team Environment	x	Client Records		Concern for Employee Satisfaction
x	Customer Skills	x	Dependability		Ensures Proper Training in New Technologies
	Entrepreneurial Orientation		Equipment Skills		Fund Management
	Implementing New Technologies	x	Initiative		Innovative Thinking
	Job Skills		Managing Meetings	x	Managing Multiple Priorities
x	Meeting Targets		Presentation Skills		Product Knowledge
x	Productivity		Project Management		Quality of Work
	Relationship Building/Networking		Results Oriented		Technical Skills
	Time Management		Training & Development		Writing Skills