

# FOUNDATION FOR THE CAROLINAS

## JOB DESCRIPTION

Administrative Assistant, Planned

Title: Giving & Center for Personal  
Philanthropy

Division/Department: Philanthropic Advancement

Reporting To: Vice President, Planned Giving & Vice President, Center for Personal Philanthropy

FLSA Classification:  Exempt  Non-Exempt

Employment Type:  Full Time  Part Time  Intern  Contract

## POSITION SUMMARY

This position provides direct client and project support to the Philanthropic Advancement professional team, specifically focusing on the Center for Personal Philanthropy and Planned Giving divisions. The direct client support includes coordination and preparation for meetings with clients and prospective clients (calendar, communication, materials and follow up) in direct service to the Relationship Managers.

This person will also play a key role on the Philanthropic Advancement Team by supporting programming and events, particularly those connected with individual and family philanthropy as well as planned giving.

This position requires high attention to detail, and strong relationship skills as well as an ability to work in a fast-paced organization. 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

### Administrative Support for Center for Personal Philanthropy & Planned Giving

- Provide general administrative and project-based support to the Vice President, Planned Giving and Vice President, Center for Personal Philanthropy
- Serve as centralized resource for Philanthropic Advancement team office supply ordering and coordinate with other administrative professionals to maintain office supplies for 2<sup>nd</sup> floor
- Capture and record prospect and existing donor information in Raiser's Edge donor software system to help build, track and monitor prospect solicitation and cultivation
- Enter and maintain additional client data in FFTC's computer systems and update as needed
- Provide prompt, high level customer service support in response to calls related to funds and general questions regarding the work of the Foundation
- Develop a command of FFTC products and services offered to speak knowledgeably to prospects and fundholders
- Generate reports as requested, including exports from databases, list generation and mail merges
- Engage with philanthropic advancement team to create and execute a robust calendar of events particularly as it relates to individual and family philanthropy as well as planned giving.
- Serve as dedicated resource to track RSVPs for all Centers for Giving programs and events

## Client 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 annual philanthropic reviews with assigned clients in support of Relationship Managers (preparing PowerPoints, relationship summaries, fund statements and investment performance).
  - Support development of new business by preparing PowerPoint presentations, drafting letters and proposals, and performing other business development tasks, including scheduling and confirming meetings and preparing prospecting packets
  - Support the team to Identify, prioritize and execute calling strategies for clients and prospects, as requested.
- Other Duties, as assigned:
    - Serve as front desk receptionist as required
    - Work with Philanthropic Advancement and Marketing/Communities teams to identify and capture fundholder stories and other FFTC initiatives.
    - Serve as back-up to the Administrative Assistant, Legal Department for new fund opening and new planned gift entry processes
    - Undertake special projects, as requested.

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:

- Minimum 5 years of professional experience in a fast-paced work environment
- Associates or bachelor's degree preferred
- 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:  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

Client Records

Concern for Employee Satisfaction

Customer Skills

Dependability

Ensures Proper Training in New Technologies

Entrepreneurial Orientation

Equipment Skills

Fund Management

Implementing New Technologies

Initiative

Innovative Thinking

Job Skills

Managing Meetings

Managing Multiple Priorities

Meeting Targets

Presentation Skills

Product Knowledge

Productivity

Project Management

Quality of Work

Relationship Building/Networking

Results Oriented

Technical Skills

Time Management

Training & Development

Writing Skills