FOUNDATION FOR THE CAROLINAS

Job Description

Title: Vice President, Donor Relations | Division/Department: Philanthropic Advancement

Reporting To: Senior Vice President, Philanthropic Advancement

FLSA Classification: [x] Exempt [ ] Non-Exempt

Employment Type: [x] Full Time [ ] Part Time [ ] Intern [ ] Contract

POSITION SUMMARY

The Vice President, Donor Relations authors and oversees a road map for client service success that is considered best in class. This person will join a highly functional team and will bring a "can do" attitude to this critical work. The ideal candidate will have a track record in effective project management as well as an entrepreneurial, problem-solving mindset and an action-oriented spirit.

The Vice President, Donor Relations will work cross departmentally to ensure consistency across the organization with the goal of high-quality donor services. The VP, Donor Relations will report to the SVP of the Philanthropic Advancement team and will manage a team of donor relations professionals. The VP will work closely with the Philanthropic Advancement and Donor Relations teams to deliver a superior customer experience. This person must have high emotional intelligence to lead their own team *and* to partner with the investment and finance teams. The overarching goal to create a short- and long-term road map for success with a focus on clients.

This role will serve as the face of client services and will lead a team to ensure best in class experience for FFTC clients. The VP plays a critical role on the Philanthropic Advancement team, working with the other VPs in service of our clients.

DUTIES & RESPONSIBILITIES

Leadership & Strategy

- Expert on FFTC client facing product lines; the "go to" person for what we offer clients and understands that responsiveness to clients is our "it" factor
- Creates a roadmap for success from the Jabian/customer experience report created in May 2021
- Works with SVP and VPs for the centers on "stickiness" factor for clients; responsible for retention and growth in gifts to FFTC
- Collaborates with executives across the agency to develop systems for providing best in class customer service/client experience
- Develops benchmarks and processes to measure success
- Educates senior staff on customer service standards and work with donor relations team to train team on protocol
- Regular review of FFTC business intelligence (Power BI) to analyze trends and identify opportunities related to service delivery (i.e., transaction volume, client behavior)
- Serves on cross-functional project teams as assigned
- Inform and educate team on legislative changes that may impact client experience

- Create a systematic approach to work with community programs team, civic leadership and grantmaking to reinforce FFTC value proposition for client experience

Donor Relations / Client Experience

- Creates and delivers a "best practice" roadmap for client experience
- Supervises donor relations team
- Serves as "problem solver" for client issues for the teams in the three centers (personal/nonprofit/corporate)
- Develops and oversees a personalized and responsive client on-boarding process
- Works with the donor relations team to oversee the workflow of all funds including new fund opening, database set up, new fundholder orientation process, and inactive and low-balance fund monitoring and closing
- Streamlines the workflow for new planned gift entry and planned gift realization
- Works hand in glove with Finance Department and donor relations team on the implementation of systems governing gift processing
- Manages regular review and update of client facing operational documents such as fund agreements, fund management forms
- Lead annual review of relationship manager assignments, dormant funds and negative balance funds
- Develop queries and dashboards to assist relationship managers in their day-to-day work
- Lead regular cross-functional internal meeting focused on client facing issues and opportunities
- Work closely with the IT team on technology decisions, upgrades or implementation impacting the client experience with the goal of building /advancing the digital experience opportunities for FFTC clients
- Serve as needed on the Core Systems Replacement team

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

- Bachelor's degree required
- Minimum 5 years of experience in donor/client relations role. This could be in financial or professional services firm or in a donor relations role at a complex nonprofit.
- Experience may include a combination of annual giving, donor relations, customer service, grantmaking, project management, and/or sales development.
- Past experience with CRM systems; Raiser's Edge preferred
- Proven track record of success in fast paced environment that values responsiveness
- High orientation to systems and service excellence
- Superior verbal and written communication skills
- Computer literacy and willingness to learn and implement new software as needed
- Able to set priorities, handle multiple tasks and meet deadlines with a high degree of accuracy
- An ongoing commitment to training in both areas of soft skills and technical skills to maintain and improve current skills and knowledge
- 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

Note: The role is in Charlotte, NC. While we are temporarily working remotely during the Covid-19 pandemic, the position will require in-person presence in Charlotte. In addition, proof of fully authorized vaccinated Covid-19 status is required (or FFTC authorized religious or disability accommodation).

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:	[X] Delegating Responsibility & Empowering Employees	[x] Managing Employee Performance	[x] 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	[ ] Dependability	[ ] Ensures Proper Training in New Technologies
[ ] Entrepreneurial Orientation	[ ] Equipment Skills	[x] Fund Management
[ ] Implementing New Technologies	[ ] Initiative	[ ] Innovative Thinking
[ ] Job Skills	[ ] Managing Meetings	[x] Managing Multiple Priorities
[ ] Meeting Targets	[ ] Presentation Skills	[x] Product Knowledge
[x] Productivity	[x] Project Management	[ ] Quality of Work
[ ] Relationship Building/Networking	[ ] Results Oriented	[ ] Technical Skills
[ ] Time Management	[ ] Training & Development	[ ] Writing Skills