FOUNDATION FOR THE CAROLINAS

Job Description

Title: Assistant Vice President, Donor Relations

Division/Department: Philanthropic Advancement

Reporting To: Vice President, Donor Relations

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

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

POSITION SUMMARY

The Assistant Vice President, Donor Relations contributes to a client services team success that is considered best in class. The Assistant Vice President, Donor Relations serves as the team lead for client and operational support, developing strategies for individual client engagement as well as broad stewardship initiatives.

The AVP, Donor Relations will work cross departmentally to ensure consistency across the organization with the goal of high-quality donor services. The AVP will work closely with the Centers For Giving and Donor Relations teams to deliver a superior customer experience, and to effectively cultivate and steward client relationships.

To help ensure representation by the Philanthropic Advancement/Donor Relations Team, this position may serve on cross-functional FFTC project teams working on initiatives impacting the Centers for Giving and FFTC at large.

This position requires high attention to detail, an understanding of the donor engagement cycle and strong relationship-building skills. 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.

DUTIES & RESPONSIBILITIES

Relationship Management & Support

- Understands FFTC's core business including the various philanthropic vehicles and products offered.
- Provides dedicated relationship management support for standard service level clients guiding clients through the donor engagement cycle.
- Serves as "problem solver" for client issues for the teams in the three centers (personal/nonprofit/corporate) and participates in serving incoming client needs through the shared Donor Relations inbox and phone line.
- Conducts annual philanthropic review and client check-in meetings.
- Provide prompt and extraordinary customer service to broad base of all FFTC internal and external constituents.
- Collaborates with Donor Relations, Executive Office and Centers for Giving colleagues to identify and execute on client and professional advisor stewardship plans and recognition opportunities.

Client Stewardship Initiatives

- Builds and executes annual plan for broad client stewardship to recognize and reinforce key client behaviors. Stewardship initiatives may include fundholder anniversaries, reaching grant milestones, and referral recognition.
- Partners with the Marketing and Communications team on broad messaging strategy, video and identification of client stories for FOCUS.
- Utilize technology integrations to improve client experience within the myFFTC donor portal.
- Develops benchmarks and processes to measure success.
- Serves on cross-functional project teams as assigned.

Operational Leadership

- Responsible for ongoing management, maintenance, and review of business processes and business process documentation captured within business process management (BPM) software. This includes a review, at least annually, of specified processes to ensure accuracy of documentation and identification of areas for process improvement. Serves as Subject Matter Expert (SME) on Donor Relations systems and processes.
- Regular review of FFTC business intelligence (Power BI) to analyze trends and identify opportunities related to service delivery (i.e., transaction volume, client behavior)
- Responsible for developing and maintaining knowledge base of resources for core systems and providing ongoing training and process reminders for new and existing employees.
- Identifies and executed ongoing data clean up and hygiene initiatives including annual review of boards and committees, tags and custom fields and relationship manager assignments.
- Documents all client interactions through actions and notes in core systems
- Maintains physical and electronic fund records in accordance with Foundation policies and procedures

Other Duties as Assigned

- Provide assistance, as required, on assigned projects, leveraging research, analytical and technical skills to help identify problems, quantify issues, and work towards solutions
- Participate in advancing the organizations diversity, equity and inclusion goals
- Assists with other projects and duties as directed by Vice President, Donor Relations

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 3 years of experience in donor/client relations role. This could be in financial or professional services firm or in a donor relations or advancement role at a complex nonprofit
- Experience may include a combination of advancement, donor relations, customer service, grantmaking, project management, and/or sales development
- Past experience with CRM systems, queries and reporting, and database management
- 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

- 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 based in Charlotte, NC. We currently work on a hybrid schedule, and the role will require partial in-person schedule in Charlotte.

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	[ ] 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	[ ] Managing Multiple Priorities
[x] Meeting Targets	[ ] Presentation Skills	[x] Product Knowledge
[ ] Productivity	[x] Project Management	[ ] Quality of Work
[x] Relationship Building/Networking	[ ] Results Oriented	[ ] Technical Skills
[ ] Time Management	[ ] Training & Development	[ ] Writing Skills