FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Specialist, Donor Relations

Division/Department: Philanthropic Advancement

Reporting To: Vice President, Donor Relations

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

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

POSITION SUMMARY

The Donor Relations Specialist provides direct client and project support to the Philanthropic Advancement/Donor Relations team. The Specialist serves as the team lead for inbox management, client onboarding, advisor updates and coding, and stewardship execution.

With over 3,000 charitable funds at Foundation For The Carolinas, the Donor Relations team plays a critical role helping clients navigate FFTC and ultimately ensuring best in class service. In addition to providing ongoing relationship management for all standard service level funds, the Donor Relations team also plays a key role in identifying and executing stewardship practices across all three Centers for Giving. The success of the Donor Relations team relies on a high level of cross-training, and system and process knowledge across all teammates.

The Specialist will be responsible for regular database audits to ensure data integrity. As such, there may be opportunities to identify and refine internal processes and create greater efficiency.

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.

DUTIES & RESPONSIBILITIES

Client Service and Support

- Understands FFTC’s core business including the various philanthropic vehicles offered
- Provides dedicated relationship management support for standard service level fund relationships
- Monitors internal and external client needs via the shared Donor Relations phone line and email inbox and serves as team lead for weekly inbox audit and clean up
- Responds professionally and knowledgeably to all incoming calls from prospects, existing clients, and professional advisors

Client Onboarding

- Leads the new fundholder and fund advisor welcome experience and orientation to create a strong “first impression” including assistance with MyFFTC (our donor portal)
- Makes annual recommendations and enhancements to the client onboarding experience
- Collaborates regularly with the Centers for Giving and Communications teams to create and update client resources

- Manages 60-day check-in process for new fundholders

Stewardship Execution
- Provides logistical support to execution of stewardship initiatives including but not limited to fund anniversary, grant milestone, and referral outreach
- Participates in annual fund activity review and releated outreach
- Takes a proactive approach in identifying donor servicing needs and works with VP, Donor Relations and AVP, Donor Relations to implement and rollout enhancements

Fund Administration:
- Ensures timely and accurate execution of new fund opening process and performs new fund audit at the time of fund opening
- Leads advisor change form process and related system updates
- Participate in fund closing process including pulling statements, emailing fundholders and final tasks in core systems

Database Management & Reporting:
- Provides general database management, including creating and executing internal procedures for ongoing maintenance and data hygiene
- Audits CRM system (GiveInteractive) on a regular basis for changes to ensure consistency and adherence to approved business processes
- Executes changes and updates to existing client and fund records
- Assists with and prepares reports and queries for staff and VIP & custom level clients, including supporting organizations
- Develops and prepares ad-hoc reporting on an as-needed basis
- Helps create queries and dashboards to assist relationship managers in their day-to-day work
- 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
- Performs other administrative duties as needed

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

- High school diploma
- High orientation to service excellence and ability to work with donors, fundholders, and staff
- Proven track record of success in fast paced environment that values responsiveness
- Strong computer skills, particularly CRM systems & Microsoft Office products
- Experience with reporting; preferably Microsoft PowerBi
- Adaptable, detailed oriented and collaborative

- A high level of discretion in handling confidential and sensitive data
- 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 and the position will require in-person presence 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	[x] Client Records	[ ] Concern for Employee Satisfaction
[x] Customer Skills	[x] Dependability	[ ] Ensures Proper Training in New Technologies
[ ] Entrepreneurial Orientation	[ ] Equipment Skills	[x] Fund Management
[ ] Implementing New Technologies	[x] Initiative	[ ] Innovative Thinking
[ ] Job Skills	[ ] Managing Meetings	[ ] Managing Multiple Priorities
[ ] Meeting Targets	[ ] Presentation Skills	[ ] Product Knowledge
[x] Productivity	[ ] Project Management	[x] Quality of Work
[ ] Relationship Building/Networking	[ ] Results Oriented	[ ] Technical Skills
[ ] Time Management	[ ] Training & Development	[ ] Writing Skills