JOB DESCRIPTION

Title: Assistant Vice President, Center for Personal Philanthropy
Division/Department: Philanthropic Advancement

Reporting To: Vice President, Center for Personal Philanthropy

FLSA Classification: Exempt

Employment Type: Full Time

POSITION SUMMARY

The Assistant Vice President, (AVP), Center for Personal Philanthropy works to grow, steward and retain the assets of the Center for Personal Philanthropy and is responsible for managing assigned strategic projects related to the Philanthropic Advancement Team (PA Team).

The AVP plays a key role as the dedicated relationship manager for an assigned portfolio of fund relationships, as well as works directly on and in support of the prospecting and cultivation efforts of new FFTC fund relationships. In addition to the direct relationship management and asset development responsibilities, the AVP will be responsible for project management activities related to sales, stewardship & product-related initiatives as identified by Vice President, Philanthropic Advancement and senior leadership of FFTC. To help ensure representation by the PA Team, this position will serve on (and, as appropriate, coordinate others serving on) cross-functional FFTC project teams working on initiatives impacting the Centers for Giving and FFTC at large.

DUTIES & RESPONSIBILITIES

- **Relationship Management & Custom Service**
  - Serve as dedicated relationship manager for a portfolio of fund relationships to provide excellent customer service & day-to-day support, stewardship, philanthropic counsel and support for long-range charitable planning
  - Deliver relationship management, grantmaking, and board support services for assigned Center for Personal Philanthropy custom clients including preparation of board meeting materials (agendas, board packets, presentations and minutes) and financial and other reports as requested
  - Available to make investment/financial report presentations in the absence of Investment staff
  - Assist Vice President, Philanthropic Advancement, in overseeing and implementing relationship management activities including execution of stewardship functions and programming opportunities for all fundholders in the Center for Personal Philanthropy
  - Identify and engage in cross-selling opportunities with existing clients to expand relationships
  - Work with Vice President, Philanthropic Advancement to design and implement annual education programs for the Center for Personal Philanthropy
  - Work with administrative staff to ensure all aspects of event execution are completed (invitation preparation, list generation, RSVPs, event detail coordination, “at-event” support functions, and related follow up)
• **Business Development**
  - Develop a command of FFTC products and services to speak knowledgeably to prospective fund holders about working with FFTC, including fund types, investment options, acceptance of complex assets, etc.
  - Contribute to the product development and financial management of endowment portfolio/suite of products at FFTC, including new program initiatives of the Center for Personal Philanthropy
  - Participate in the prospecting process to cultivate and onboard new fundholders, including prospect research, proposal preparation, meeting participation and follow ups
  - Plan, track and report on activities with prospects using database system and provide strategic input and direction on database best practices
  - Identify, attend and support events sponsored by FFTC as prospect generation strategy
  - Serve the PA Team in executing new or existing strategic initiatives which broaden scope of FFTC products and service

• **Operations & Project Management**
  - Represent the PA Team in serving on (and, as appropriate, coordinates others serving on) cross-functional FFTC project teams working on initiatives impacting the Centers for Giving, including investments, pricing, product development, database management, financial systems, technology, stewardship practices and client reporting.
  - Serve as “project manager” for the PA Team for assigned projects, leveraging research, analytical and technical skills to help identify problems, quantify issues, and work towards solutions.
  - Serve as a Subject Matter Expert for the PA Team and:
    - Understand the end-to-end business processes in detail within PA Team’s business and strive towards continuous improvements;
    - Understand the inter-relationship between PA Team processes and processes within other functional areas; and
    - Keep process documentation up-to-date and train new employees on the processes (where appropriate).

*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 (focus on business, marketing, finance or related field)
- At least 3-5 years of experience, preferably in fundraising, development, or financial services/wealth management
- Previous communications, development or marketing experience in a corporate or nonprofit setting preferred
- Excellent computer skills including working knowledge of Microsoft Office applications
- Previous experience with Blackbaud software preferred
- Initiator who is detail-oriented and a self-starter, customer service and sales orientation
- Ability to set priorities, handle multiple tasks and meet deadlines with a high degree of accuracy and urgency, while receiving deliverables from multiple team members
- Ability to be flexible in a work environment often filled with challenging situations and resource constraints
- Excellent oral and written communications skills
- Excellent interpersonal skills
- 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: Proof of fully authorized vaccinated COVID-19 status and booster are 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:*  
- 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