

FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Vice President, Regional Business Development Division/Department: Philanthropic Advancement

Reporting To: Vice President, Philanthropic Advancement (Center for Personal Philanthropy / Planned Giving)

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Contract

POSITION SUMMARY

Foundation For The Carolinas philanthropic footprint spans 13 counties in North and South Carolina. The Vice President, Regional Business Development will lead FFTC's business development efforts, outside Charlotte-Mecklenburg, with a focus on establishing personal and corporate Donor Advised Funds and new planned gifts. This person will be primarily 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.

The Vice President, Regional Business Development should expect to routinely travel within FFTC's regional footprint and must be a self-starter who is detail-oriented and strives to provide impeccable, personalized, and responsive client service.

DUTIES & RESPONSIBILITIES

- Business Development
 - Helps create FFTC's business development strategy for Cabarrus, Cherokee, Cleveland, Richmond, Iredell, Lancaster, Lexington, Lincoln, Salisbury-Rowan, Stanly, Union, and York Counties.
 - Personally manages a portfolio of at least 50 significant clients and oversees stewardship of additional regional relationships.
 - Leads the regional prospecting process to cultivate and onboard new fundholders and new planned giving clients, including prospect research, proposal preparation, meeting participation and follow ups
 - Cultivates key professional advisor relationships through individual meetings, firm presentations and continuing education programs for professional advisors in the region
 - Creates an annual communication plan for advisors in key counties identified by VP
 - Develops 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.
 - Plans, tracks and reports on activities with prospects using database system and provides strategic input and direction on database best practices
 - Identifies, attends and supports events sponsored by FFTC as prospect generation strategy
 - Plans and executes donor relations and donor cultivation events in the counties as identified.

- Drafts, reviews and revises appropriate fund agreements and other documents, in keeping with the policies and procedures of FFTC, to represent the wishes of donors.
- Stewardship
 - Creates and manages active, ongoing personal stewardship for regional donors
 - Creates the opportunity to engage with representatives in counties served by FFTC on a regular basis including through online webinars, in-person events, seminars for professional advisors, etc.
 - Develops and tracks strong relationships with existing donors and provides donor-centered services regarding the personal philanthropic objectives of donors and their families.
 - Identifies and plans strategic involvement of FFTC leadership in regional footprint.
- Operations and Project Management
 - Represents 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.
 - Serves 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.
 - Serves as a Subject Matter Expert for the PA Team and:
 - Understands 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
- Marketing / Storytelling
 - Works closely with FFTC’s marketing and communications team to highlight donor and regional stories
 - Works closely with FFTC’s Community Programs & Civic Leadership team to identify common goals and objectives within FFTC’s regional footprint
- Other Duties
 - 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
- Graduate degree in law, business or public administration strongly preferred.
- Minimum 3-5 years of experience, preferably in fundraising, development, or financial services/wealth management
- Familiarity with the FFTC’s regional footprint, critical community issues, key organizations, civic leaders, and resources.
- Residence in counties outside Mecklenburg preferred

Skills and Abilities:

- Superior communication skills, including verbal, written and presentation skills
- Initiator who is detail-oriented and a self-starter, customer service and sales orientation
- Excellent interpersonal skills
- Strategic mindset with ability to execute comprehensive plans

- 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 delegate as needed
- Highly organized and adaptable with an optimistic mindset
- Ability to work independently and in a fast-paced environment
- Excellent computer skills including working knowledge of Microsoft Office applications.
- Previous experience with Blackbaud software preferred
- 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 10 or less.

All Employees: Communication & Interpersonal Skills

General:

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| <input type="checkbox"/> Affiliate Management | <input type="checkbox"/> Budgeting & Cost Awareness | <input type="checkbox"/> Building Organizational Commitment |
| <input type="checkbox"/> Building Team Environment | <input type="checkbox"/> Client Records | <input type="checkbox"/> Concern for Employee Satisfaction |
| <input type="checkbox"/> Customer Skills | <input type="checkbox"/> Dependability | <input type="checkbox"/> Ensures Proper Training in New Technologies |
| <input type="checkbox"/> Entrepreneurial Orientation | <input type="checkbox"/> Equipment Skills | <input type="checkbox"/> Fund Management |
| <input type="checkbox"/> Implementing New Technologies | <input checked="" type="checkbox"/> Initiative | <input type="checkbox"/> Innovative Thinking |
| <input type="checkbox"/> Job Skills | <input type="checkbox"/> Managing Meetings | <input checked="" type="checkbox"/> Managing Multiple Priorities |
| <input type="checkbox"/> Meeting Targets | <input checked="" type="checkbox"/> Presentation Skills | <input checked="" type="checkbox"/> Product Knowledge |
| <input checked="" type="checkbox"/> Productivity | <input type="checkbox"/> Project Management | <input type="checkbox"/> Quality of Work |
| <input checked="" type="checkbox"/> Relationship Building/Networking | <input checked="" type="checkbox"/> Results Oriented | <input type="checkbox"/> Technical Skills |
| <input type="checkbox"/> Time Management | <input type="checkbox"/> Training & Development | <input type="checkbox"/> Writing Skills |