FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Specialist, Donor Relations   Division/Department: Philanthropic Advancement

Reporting To: Manager, 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.

With over 3,000 charitable funds at Foundation For The Carolinas, the Specialist plays a critical role helping clients navigate FFTC and ultimately ensuring best in class service. In addition to direct relationship management for all standard service level funds, the Specialist will also play a key role in identifying and executing stewardship practices across all three Center for Giving.

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.

This position requires high attention to detail, and strong relationship skills. The position will be supporting a number of professional team members and as such, must be organized, a self-starter and adept at prioritizing and executing a variety of responsibilities.

DUTIES & RESPONSIBILITIES

Relationship Management & Support:

- Provides dedicated relationship management support for standard service level fund relationships
- Works closely with the Manager, Donor Relations and Senior Donor Relations Specialist to execute donor servicing protocols such as fund openings, planned gift entry, non-profit due diligence, and advisor updates.
- Ensures timely/accurate execution of new fund opening process that is personalized and responsive
- Assists with the new fundholder and fund advisor orientation to create a strong “first impression” including assistance with MyFFTC (our donor portal)
- Provides assistance with and outreach to inactive and low-balance funds
- Helps create queries and dashboards to assist relationship managers in their day-to-day work
- Responds professionally and knowledgeably to all incoming calls from prospects, existing clients, and professional advisors

- Understands FFTC's core business including the various philanthropic vehicles offered Assists with the monthly fund statement / reconciliation process to ensure timely release of statements to fundholders
- Maintains physical fund / planned gift files
- Assists with the execution of realized planned gift documentation in collaboration with both external and internal partners.
- Assists the Center for Personal Philanthropy with planned gift reporting to include tracking the overall pipeline, realized gifts, and grantmaking impact for distribution both internally and externally
- Initiates planned gift related fund changes, as required.
- Acts as Donor Relations Team liaison for clients and staff
- Takes a proactive approach in identifying donor servicing needs and works with VP, Donor Relations and Manager, Donor Relations to implement and rollout enhancements
- Manages the donor acknowledgement process to ensure compliance with FFTC's internal processes.
- In coordination with the Donor Relations team, executes updates to existing fund relationships as requested

Operations & Project Management:

- Understands the end-to-end business processes in detail within Donor Relations/Philanthropic Advancement and strives towards continuous improvements.
- Understands the inter-relationship between Donor Relations/Philanthropic Advancement processes and processes within other functional areas; and
- Keeps process documentation up-to-date and trains new employees on the processes (where appropriate).

Database Management & Reporting:

- Provides general database management, including creating and executing internal procedures for ongoing maintenance and audits
- Audits the databases (focusing on Raiser's Edge and Granted Edge) on a regular basis for changes to ensure consistency and adherence to approved business processes
- 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

Additional Responsibilities:

- Provide assistance, as required, on assigned projects, leveraging research, analytical and technical skills to help identify problems, quantify issues, and work towards solutions.

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
- Ability to work with donors, fundholders, and staff
- Strong computer skills, particularly Blackbaud & Microsoft Office products
- Adaptable, detailed oriented and collaborative
- A high level of discretion in handling confidential and sensitive data
- Ability to be flexible in a work environment often filled with challenging situations and resource constraints

- 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: [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	[ ] 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