

# FOUNDATION FOR THE CAROLINAS

## JOB DESCRIPTION

Title: Assistant Vice President, Centers for Giving Division/Department: Philanthropic Advancement

Reporting To: Vice President, Philanthropic Advancement

FLSA Classification:  Exempt  Non-Exempt

Employment Type:  Full Time  Part Time  Intern  Contract

### POSITION SUMMARY

The Assistant Vice President, (AVP), Centers for Giving works to grow, steward and retain the assets of two of Foundation For The Carolinas' (FFTC) Centers for Giving – Nonprofit Sustainability and Corporate 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 and Custom Services

- 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 Centers for Giving 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 Nonprofit Sustainability and the Center for Corporate Philanthropy
- Serve as key staff member managing the Charlotte Community Affairs Professionals (CCAP) group which consists of community affairs professionals from local and national companies based in the Charlotte area
- 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 Nonprofit Sustainability and the Center for Corporate Philanthropy
- Responsible for managing annual programming planning process to determine content and calendar of events for nonprofit and corporate relationships, working closely with other PA Team members to design and implement programs
- 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 Nonprofit Sustainability and Center for Corporate 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 services

## **Operations and 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
- Project management experience preferred
- 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

### 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:*

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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 checked="" type="checkbox"/> Fund Management                  |
| <input type="checkbox"/> Implementing New Technologies               | <input 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 type="checkbox"/> Productivity                                | <input checked="" type="checkbox"/> Project Management  | <input type="checkbox"/> Quality of Work                             |
| <input checked="" type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented               | <input type="checkbox"/> Technical Skills                            |
| <input type="checkbox"/> Time Management                             | <input type="checkbox"/> Training & Development         | <input checked="" type="checkbox"/> Writing Skills                   |