

FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Assistant Vice President for Stewardship and Legacy Giving Division/Department: Philanthropic Advancement

Reporting To: Executive Director, Foundation for the Charlotte Jewish Community

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Contract

POSITION SUMMARY

The Assistant Vice President (AVP) for Stewardship and Legacy Giving will assist in growing, stewarding and retaining the assets of the Foundation for the Charlotte Jewish Community (FCJC) by building strong relationships within Charlotte's Jewish community. In collaboration with the FCJC Executive Director, the AVP will manage FCJC's Create Your Jewish Legacy (CJL) Initiative, serving as the primary contact and relationship manager with CJL community partner organizations and the Harold Grinspoon Foundation. This will include project management responsibilities related to promoting and stewarding Book of Life members, as well as related activities and events. The AVP will also assist in the identification of high-net-worth individuals with the capacity of utilizing the services provided by FCJC.

The AVP will utilize FCJC's donor engagement model to establish and build relationships with new and existing FCJC clients and the community's legacy donors. This includes serving as the primary contact for the organization and planning of the annual legacy celebration. Additional responsibilities will include initiatives, as identified by the Board of Directors, to create and implement a strategic vision of innovatively growing the FCJC brand and serving the needs of Charlotte's Jewish community. As a part of FFTC's Philanthropic Advancement team, the AVP will collaborate with FFTC colleagues.

DUTIES & RESPONSIBILITIES

Relationship Management

- Develop strong relationships with existing donors to provide donor-centered services to meet the personal philanthropic objectives of donors and their families and deepen/expand existing client relationships
- Maintain a portfolio of assigned current fund and planned gift relationships, serving as the dedicated FCJC relationship manager to provide excellent customer service & day-to-day support, stewardship, philanthropic counsel and support for long-range charitable planning
- Maintain prospect and existing donor information in Raiser's Edge donor software system to help build, track and monitor prospect solicitation and cultivation
- Work with Finance & Donor Relations team on special projects related to donor stewardship, donor servicing, operational processes, etc. to enhance client deliverables
- Consistently and effectively communicate with key, cross-functional team members to ensure the coordination among Civic Leadership, Corporate, Nonprofit or Campaign efforts as it relates to FCJC key prospects and fund holders

- Support FCJC's marketing efforts by joining internal marketing committee, meeting to identify and execute strategic priorities related to key business lines
- Special projects as assigned

Create Your Jewish Legacy Initiative

- Manage the Create Your Jewish Legacy Initiative: training community partner teams to identify, cultivate and steward prospects when seeking current and planned gifts
- Serve as key public face for FCJC in legacy and planned giving presentations
- Assist in the further development of the Book of Life RE database to track progress of the Create Your Jewish Legacy Initiative and FCJC Planned Giving
- Continue to direct the strategic and day-to-day responsibilities of donor stewardship in regard to the Jewish community's planned giving portfolio by informing agencies of new gifts and maintaining a community wide database of realized gifts
- In conjunction with the Executive Director, plan, create and implement marketing efforts to promote CJL, including website content, marketing collateral, direct mail, advertising and donor profiles.
- Assist in the planning, marketing and execution of FCJC's annual meeting and community legacy celebration
- Keep abreast of current tax laws and planned giving trends

Business Development

- Assist Executive Director in business development activities for FCJC, particularly with largest donors and prospective fund holders and planned giving donors
- Develop and demonstrate a command of superior product and industry knowledge to successfully cultivate new clients and active referral sources
- Train and educate prospects, clients and professional advisors/key referral sources regarding FCJC and CIF products and services to grow assets
- On complex gift transfers including deferred gifts, real estate, closely held stock and other non-cash gifts, develop and manage relationships in coordination with the legal team
- Attend community and industry events on behalf of FCJC to maintain and cultivate new relationships with prospects and referral sources
- Continue to represent FCJC and Charlotte's Jewish community at Jewish Federation of North America and Harold Grinspoon Foundation national conferences.
- Identify, attend and support events sponsored by FFTC and FCJC as prospect generation strategy
- Participate in processes and procedures to integrate the asset development efforts of the team, including but not limited to, data tracking, dashboards, information sharing, and cross-selling.
- Work collaboratively with the Executive Director to create and maintain fundraising materials and to implement strategic initiatives to grow FCJC assets and to highlight existing fund holder relationships (direct mail, advertising, event/table sponsorships, marketing collateral, website content)

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 and understanding of Jewish community are preferable
- Initiator who is detail-oriented and a self-starter, customer service and sales orientation
- Ability to set priorities, manage 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:

- | | | |
|--|---|--|
| <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 |