

# Donor Services Officer

## POSITION DESCRIPTION

The Donor Services Officer oversees the administrative functions associated with the Foundation's donor-advised funds while providing customer service and grants assistance for fund advisors. This position reports to the Director, Philanthropic Services and works cooperatively with the Philanthropic Services and Advancement department and all other Foundation staff.

## ABOUT THE WINSTON-SALEM FOUNDATION

We are a nonprofit community foundation, comprised of over 1,500 funds, that assists people and organizations with their charitable giving, provides financial aid to college students, and makes Community Grants to nonprofit organizations in Forsyth County. As the oldest foundation in North Carolina and one of the oldest community foundations in the country, we recognize that we are an institution with great privilege and responsibility. In recent years, we have been applying a racial equity lens to all our work, both internal and external. We are committed to thinking and acting in a way that is accountable to the communities we serve and sustains the advancement of racial equity in Forsyth County and beyond.

### Our vision:

A generous and trusting community where everyone is thriving.

### Our mission:

We inspire giving and link resources to action, strengthening Forsyth County—now and forever.

### Our values:

- **Inclusion:** We practice and champion inclusion, honoring the strengths and experiences of all in our community.
- **Accountability:** We honor the intentions of our donors and partners and hold ourselves to the highest standards of ethics, service and stewardship.
- **Continuous Learning:** We are committed to learning and evolving with our community and our partners.

## DESCRIPTION OF RESPONSIBILITIES

### Donor-Advised Fund Administration and Operations (45%)

- Direct the administrative tasks and approval process associated with grants from donor-advised funds
- Approve grants daily to ensure all are processed in a timely manner
- Work closely with Grants Processor & Administrative Assistant to assist with additional due diligence on grants as necessary. Follow up with fund advisors if there are questions about the grants they submitted.
- Help troubleshoot issues that fund advisors encounter in the online portal
- Assist in maintaining accurate contact information for donors, prospective donors, and professional advisors in the database; record interactions with these constituents

- Apply fund administration and database knowledge to participation in department-wide projects related to tracking information, reporting, and filing electronic documents, among other tasks
- Work with team on process improvements for donor services, including associated technologies
- Develop a working knowledge of fund agreements
- Follow-up with fund advisors to ensure compliance with policies related to fund balances and fund activity
- Share insights about donor advisors and their activity with other departments
- Support and participate in organizational initiatives, projects, and policy development in the capacity of “subject matter expert” on donor-advised fund operations

### **Donor Services (40%)**

- Provide prompt, thoughtful, and thorough responses to fundholder inquiries. Practice active listening, open ended dialogue, and rapport-building to gain a thorough understanding of fundholders’ needs
- Work with Advancement staff as they establish new donor-advised funds
- Conduct orientation sessions for new fund advisors; provide additional tutorials as needed to assist donor advisors with their grantmaking
- Upon request, provide reports to donors about their charitable giving
- Conduct meetings with fund advisors to plan annual grantmaking or strategic giving
- Educate fund advisors about the Foundation’s focus areas and Strategic Initiatives, inviting them to co-invest in shared interest areas; provide follow-up for donors who contribute in this way
- Share information about nonprofit organizations with donor advisors as requested
- Proactively cultivate relationships with new and existing donor advisors
- Assist Philanthropic Services and Advancement teammates with the planning, coordination, and implementation of donor meetings, engagement events, and special projects as requested

### **Knowledge and Learning (5%)**

- Maintain and expand technical awareness and knowledge of donor-advised fund regulations and best practices for grant administration, document learnings in these areas
- Stay aware of needs and causes in the Forsyth County community, particularly as they relate to the interests of donor advisors
- Assist in maintaining accurate contact information for donors, prospective donors, and professional advisors in the database; record interactions with these constituents

### **Other related activities (10%)**

- Partner with Foundation staff on tasks that concern the broad agenda of the Foundation’s work to ensure that decisions are made with diverse input to benefit a common good
- Participate in regular staff, departmental, and other internal meetings
- As requested, attend Foundation-sponsored events; represent the Foundation at community and grantee events on occasion
- Other activities and projects as assigned by the director, philanthropic services, president, or executive vice president

## QUALIFICATIONS

- Direct customer service experience required (background in financial services or non-profit sector may be helpful)
- Residency in Forsyth County is preferred
- Experience with a constituent management database is an advantage
- Demonstrated passion for helping others
- Strong written and oral communication skills with the ability to deliver technical information in lay terms
- Well-developed organizational and time-management skills, demonstrating an ability to organize, manage and juggle competing priorities
- Problem-solving abilities
- Attention to detail with an emphasis on accuracy; experience analyzing information and catching errors others may have overlooked
- Ability to work as part of a team and also independently
- Commitment to and understanding of racial equity
- Strong commitment to the Foundation's values
- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures and seek out diverse perspectives to inform continuous improvement opportunities

Salary range is \$58,000 - \$63,000, commensurate with experience. Benefits include generous paid time off (PTO) and holidays. Health insurance, life insurance, dental insurance, short-term and long-term disability insurance, and parental leave begin the first of the month following 30 days of employment. Eligibility for the defined benefit retirement plan begins after one year of service. Other optional benefits include a flexible benefit plan, supplemental insurance with AFLAC, employee supplemental retirement plan, charitable match program, and tuition and fee reimbursement.

The Winston-Salem Foundation is committed to building a staff that reflects the community served by the Foundation's mission and strategic priorities. We invite applications from diverse candidates and will not discriminate on the basis of race, color, sex, religion, national origin, sexual orientation, gender identity, age, genetic information and veteran or disability status.

To apply, please visit [wsfoundation.org/careers](https://wsfoundation.org/careers). The application deadline is **5:00pm on May 20, 2021**.