



FOCUSED FORWARD

Community Foundation
for Greater Buffalo

Director, Client Relations

The Community Foundation for Greater Buffalo is seeking to hire a **Director, Client Relations**.

SUMMARY

The Director, Client Relations (DCR) reports to the Associate Vice President, Giving Strategies. The primary focus of this position is to proactively engage the Community Foundation's current clients and strengthen relationships with an assigned portfolio of clients by serving as a trusted philanthropic advisor. The DCR will provide premier client service, outreach, advisory and educational activities with the end goal of establishing the Community Foundation as clients' preferred philanthropic vehicle.

This position will serve as a representative of the Community Foundation in interactions with its current and prospective clients, advancing the Community Foundation's values and brand. This role requires sensitivity and integrity, due to the DCR's potential influence in the community and access to the Community Foundation's and clients' highly confidential information. As such, the DCR must maintain high standards of ethics and confidentiality.

KEY RESPONSIBILITIES

- Implements the Community Foundation's goals to engage and retain current clients and attract and cultivate prospective clients.
- Manages a portfolio of clients through deliberate cultivation based on proactive individualized plans. Cultivation plans are created in coordination with the Giving Strategies team and are designed to increase current and prospective client engagement across specific metrics which are aligned with the Community Foundation's strategic goals.
- Provides high-level service to each individual, family or organizational client, establishing understanding and expectations with clients and prospective clients.
- Maintains regular communication with clients with a focus on engagement and outcomes.
- Responds to client inquiries in a timely manner, executing client requests, maintaining database information, and monitoring the Community Foundation's opportunity to further engage clients.
- Researches, develops, implements and evaluates specific client relations services, programs, and events to further engage current clients.
- Participates in the new client welcoming process and ensures smooth transition from being a prospective client to a welcomed client.
- Utilizes benchmarks and processes to measure and report success in delivering client services.
- Be gracious to all and be able to relate effectively with a wide spectrum of people in the community, including the Board of Directors, clients, grantees and the general public.
- Works alongside colleagues in supportive and collaborative manner; teaming to provide solutions which advance Community Foundation goals.

OTHER JOB DUTIES

- Demonstrates expertise in delivery of charitable services, such as planned giving, engaging multiple generations in philanthropy, strategic charitable planning and other programs and services deemed important by the Community Foundation
- Facilitates synergy between clients' charitable interests, strategic initiatives and priority community needs

- Builds the network—proactively shape and manage the “word-of-mouth” reputation of the Community Foundation
- Ensures exceptional client records in the Foundation’s integrated database (FIMS/CRM), including profile information, history, codes, interests, etc., as well as paper fund files
- Expertise with FIMS and CRM databases

TRAVEL

- Travel is primarily within the eight counties of Western New York. Some domestic travel may be required for job training and professional development.

TECHNICAL EXPERTISE/EXPERIENCE AND QUALIFICATIONS

- Bachelor’s degree
- Minimum of seven years experience (or equivalent) in the nonprofit sector or a related field (i.e., client service, financial services, sales/development or planned giving)
- Ability to apply and adapt required expertise to organizational particulars
- Business acumen and client development experience; community knowledge and investment knowledge a plus
- Working knowledge of databases and computer word processing and spreadsheets
- Exhibit excellent oral and written communication skills; can write clearly and be able to explain complex topics simply

ABOUT THE COMMUNITY FOUNDATION:

Celebrating its centennial year in 2019, the Community Foundation for Greater Buffalo was established in 1919 to enhance and encourage long-term philanthropy in the Western New York community. A 501 (c)(3) organization, the Community Foundation’s mission is: Connecting people, ideas and resources to improve lives in Western New York. For 100 years the Community Foundation has made the most of the generosity of individuals, families, foundations and organizations who entrust charitable assets to the Community Foundation’s care. Learn more at www.cfgb.org.

APPLICATION PROCEDURE

Community foundations are designed to grow and evolve as our community’s needs change, and new positions are regularly created as a result. As the Community Foundation for Greater Buffalo continues to grow, we’re looking for talented people who want to use their abilities to make a lasting difference. If that is you, then please send a cover letter explaining your interest in this position and what you would bring to the Community Foundation for Greater Buffalo.

Send cover letter and resume as a single Word or PDF document via email to: Jobs@CFGB.org.

Please submit responses electronically via email. Response may also be received by U.S. Postal Service if an electronic medium is not available. No calls please.

Application deadline: Open until filled. We thank all candidates for their interest; however, only those selected for an interview will be contacted. The Community Foundation for Greater Buffalo is an equal opportunity employer that values diversity, practices inclusion and works to advance equity.