

**PROVISION FINANCIAL RESOURCES OF NC BAPTIST, INC.****POSITION DESCRIPTION**

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**POSITION ASSIGNMENT:**

Position Title: Donor Relations Associate  
Recruited by: EVP, Chief Trust & Planned Giving Officer

**WORKING RELATIONSHIP:**

Reports to: EVP, Chief Trust & Planned Giving Officer  
Works cooperatively with: All Provision personnel but specifically with EVP, Chief Trust & Planned Giving Officer, EVP, Ministry Impact Strategies, Development Team, and Executive Assistant

**BASIC FUNCTIONS:**

The Donor Relations Associate serves as Provision's primary representative, assisting others in our mission to encourage and enable faithful and wise financial stewardship for the glory of God and the good of the world. Working together in a team environment and collaborating with other partners, financial advisors, and donors, the Donor Relations Associate provides administrative and donor support for Provision's development teams (Trust/Planned Giving and Ministry Impact) as well as overall support to the organization's day-to-day functions.

**RESPONSIBILITIES:**

- Serves as the initial point of contact for inbound calls and emails for the Provision team, ensuring that they are correctly directed to the appropriate team member
- Receipting and processing donations for various gifts and purposes (trusts, endowments, donor-advised funds, OneFund, loan payments, etc.)
- Prepare and file correspondence and trust/endowment agreements as needed by the development teams
- Provide support for entering/updating information into Provision's CRM system utilized by the Development teams (currently HubSpot)

- Organize and provide special donor activity reporting for Leadership as requested
- Organize and execute special mailings (annual OneFund, fund statements, annual tax letters, personal thank you cards, etc.)
- Maintain master agreements and other forms used by the development teams
- Participate in and provide support for the Ministry Impact Strategies committee
- Process and distribute mail and ensure outgoing mail is sent
- Work with development and marketing teams to ensure supplies are available for team members and events
- Serve as receptionist support for Provision
- Work with Leadership to assist in preparation for special events and conferences
- Primary backup for the Executive Assistant
- Perform any other office duties assigned by leadership

### **MINIMUM REQUIREMENTS FOR POSITION:**

1. Equivalent education level required:
  - Graduate of accredited business school or equivalent on-job experience.
2. Experience required:
  - No less than three years of secretarial or administration experience.
  - Working knowledge of Microsoft Office / Microsoft Teams
3. General:
  - Strong working secretarial knowledge with a capacity for learning trust and legal document preparation.
  - Experience with donor support systems, trust & investment systems, CRM systems, and document scanning systems a plus.
  - Pleasant voice and disposition; capable of meeting the public well.
  - Ability to relate to other team members professionally and in a Christian spirit.

Interested in this role? [Click here to apply or visit provision.org/careers](https://provision.org/careers)