Position Title: Giver Services Manager

Reports To: Chief Operating Officer
Status: Full-time, Exempt
Location: Lawrenceville, GA

Position Summary

The Giver Services Manager plays a pivotal role in cultivating and sustaining strong relationships with givers, fund advisors, and internal stakeholders. This position supports the Presbyterian Church in America Foundation's (PCAF) mission *to enable Christians to give more and more effectively as the Church to advance the Kingdom and manifest the presence of the Kingdom in their hearts* by providing personalized service to Donor Advised Fund (DAF) holders, managing fund administration and facilitating grantmaking processes. The ideal candidate is both relational and detail-oriented, with a heart for service and a commitment to excellence in giver care.

Essential Responsibilities

Giver Relations & Stewardship

- Build and maintain a portfolio of giver relationships, delivering exceptional service and timely communication.
- Serve as the primary liaison for DAF givers, guiding them through fund establishment, gifts of cash and marketable securities and grant recommendations.
- Coordinate and implement stewardship of givers in collaboration with broader giver engagement and marketing initiatives.
- Facilitate giver education on giving strategies, and the use of online portals and tools to access fund information and recommend grants.
- Participate in giver or prospect meetings as requested by senior leadership, providing information and support.

Fund Administration & Compliance

- Oversee the setup and maintenance of DAF accounts using **Blackbaud Raiser's Edge** and **Financial Edge**.

- Processing contributions (cash and marketable securities) and proceeds of liquidated gifts of complex assets and ensure accurate fund allocation.
- Facilitate grantee qualification and fulfillment of grant recommendations in compliance with IRS regulations and PCA Foundation policies.
- Ensure ethical standards and regulatory compliance in all giver interactions and fund activities.

Communication & Reporting

- Manage giver communications including welcome materials, gift acknowledgment letters and receipts, grant confirmations, and giving reports.
- Maintain accurate records of giver contact information, interests, relationships, interactions, and service activities using organizational databases.
- Review and maintain fund activity reports and giver statements to support giving and transparency.

Collaboration & Process Improvement

- Collaborate with internal teams including accounting, legal, major giver engagement, marketing, and IT to enhance giver services.
- Identify and implement process improvements to streamline the giver experience and related operations.
- Assist in organizing giver cultivation and fellowship events to deepen giver engagement.

Personal, Spiritual, and Professional Development

- Engage in regular prayer, study of Scripture and other Christian learning mechanisms to develop personal, spiritual, and professional maturity.
- Maintain professional and technical knowledge by attending educational seminars, workshops, reviewing professional publications, and networking.

Building Christian Community Through a Gospel Focus

- Actively seek the strengthening of the Holy Spirit to show the love of Christ in day-to-day behavior, exhibiting unremitting integrity and strong moral character.
- Demonstrate increasing faith in and love of Christ in service to others.
- Pray regularly for employees, givers, and charities involved with PCAF.
- Attend weekly Devotions and team building events.

Qualifications

Education

- A bachelor's degree in Accounting, Finance, Mathematics, Computer Science or another related field is required
- Series 7 license is a plus
- Certified Financial Planner (CFP) certification or Certified Advisor in Philanthropy (CAP) is a plus

Experience

- A minimum of five years of experience in customer service-oriented environment is required
- Five years of related experience in managing a team in a financial services environment is a plus
- Previous experience in administrating brokerage accounts for incoming securities, selling securities and obtaining sale confirmations is required
- Experience in high transaction volume environments is required

Knowledge Base

- Financial industry and securities markets
- IRS non-profit regulations governing charitable giving and nonprofit compliance
- Donor Advised Funds or charitable financial services
- ERP and CRM systems and Microsoft Office applications

Competencies

<u>Technical & Professional Expertise</u>

- Solid understanding of accounting principles and financial practices
- Demonstrates financial acumen; effectively interprets and utilizes financial data
- Proficient in independent task execution with minimal supervision
- Strong attention to detail; consistently delivers work with high accuracy
- Excellent organizational and time management skills

<u>Leadership & Initiative</u>

- Proven ability to lead, motivate, and inspire teams
- High degree of initiative and sound independent judgment

- Inspires trust through integrity, reliability, and ethical conduct
- Anticipates customer needs and proactively meets expectations

Communication & Collaboration

- Exceptional interpersonal, written, and verbal communication skills
- Communicates effectively with vendors and colleagues across all levels
- Listens actively and respectfully; seeks to understand before responding
- Promotes collaboration and fosters a cooperative team environment
- Builds mature, trust-based relationships across the organization

Professionalism & Values

- Handles confidential information with discretion and professionalism
- Demonstrates courtesy, tact, and ethical behavior in all interactions
- Maintains a consistently positive and solution-oriented attitude

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Personal Attributes

- Service-oriented with a heart of love arising from the confession of the Gospel
- Commitment to the mission and theological values of the **Presbyterian Church in America**

To apply for consideration please send an e-mail along with your resume:

Tom Mayfield

Associate Business Manager

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Presbyterian Church in America
FOUNDATION

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