



FUNDHOLDER SERVICES ADMINISTRATOR

POSITION OVERVIEW:

The North Georgia Community Foundation (NGCF) is seeking a detail-oriented, highly organized, and service-driven professional to serve as Fundholder Services Administrator. This key role is responsible for the operational oversight and support of NGCF's fundholder services. The Fundholder Services Administrator will manage all aspects of fund documentation, oversee the process of fund opening and closing, ensure compliance with required documentation, generate fundholder reports, and provide data analysis to inform strategic decision-making. This position also plays a critical role in stewarding strong relationships with fundholders and supporting fiscal sponsorships and inactive funds.

PRIMARY RESPONSIBILITIES:

1. *Fund Administration & Documentation*

- Prepare and manage fund agreements, amendments, and other required fund documents
- Ensure all fund files are accurate, complete, and compliant with legal and policy requirements
- Manage the process of opening and closing of funds, including workflow tracking, data entry, and system updates
- Monitor fund activity and manage inactive or dormant funds in accordance with NGCF policy

2. *Fundholder Services & Relationship Management*

- Provide timely, accurate, and high-quality service to fundholders, ensuring a personalized and positive experience
- Assist with the onboarding of new fundholders and support ongoing communication to ensure satisfaction and engagement
- Manage fiscal sponsorship relationships with attention to detail, service, and compliance
- Manage a portfolio of fundholders, serving as their primary point of contact for fund relations

3. *Reporting & Data Analysis*

- Prepare regular and ad-hoc fundholder and internal reports for the President & CEO and other staff as needed
- Provide analysis of fundholder data and trends to support strategic decisions and initiatives
- Maintain accuracy and consistency of fund-related data in NGCF's systems and databases

4. *Collaboration & Team Support*

- Work closely with the finance, grants, and donor services teams to ensure smooth fund operations
- Participate in cross-departmental initiatives, events, and strategic planning as appropriate
- Identify opportunities for process improvement and contribute to operational efficiency

5. *Additional Responsibilities*

- Represent NGCF at community events, meetings and conferences when appropriate
 - Actively participate in professional development
 - Work to ensure successful outcomes of the Foundation's goals and objectives
 - Other projects/duties as assigned for the overall benefit of the organization
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POSITION QUALIFICATIONS:

- Bachelor's degree required, or equivalent combination of education and experience
- At least 3–5 years of experience in a nonprofit, philanthropic, or client service role preferred
- Strong attention to detail and ability to manage multiple tasks simultaneously
- Excellent organizational skills, with the ability to work independently and as part of a team
- Strong team player who supports the focus on team and willing to help team members when needed
- Superior interpersonal and communication skills, with a focus on relationship-building and customer service
- Proficiency in Microsoft Office Suite, especially Excel; experience with donor or fund management software is a plus
- Commitment to NGCF's mission and values

PREFERRED SKILLS AND ATTRIBUTES:

- Familiarity with fiscal sponsorships, charitable funds, or community foundations a plus
- Experience with data management and reporting
- Ability to exercise discretion, maintain confidentiality, and demonstrate sound judgment
- A proactive, problem-solving mindset with a commitment to continuous improvement