



## DIRECTOR OF DONOR RELATIONS PLANNED GIVING

TITLE: DIRECTOR OF DONOR RELATIONS PLANNED GIVING  
SUPERVISOR: VICE PRESIDENT OF ADVANCEMENT  
FLSA STATUS: EXEMPT

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### SUMMARY

As an integral part of The Foundation's management team, the Director of Donor Relations Planned Giving is responsible for the identification, cultivation, solicitation and stewardship of planned giving donors. The Director works with the Donor Experiences and Communications teams to provide superior donor experiences and oversee the creation and distribution of all collateral and marketing materials to include the design, production and distribution of print and A/V materials, web-site updates as well as the organization of meetings, trainings and recognition events.

### **The Diocese of Orlando four core values lay the foundation for the work performed by its employees.**

1. *Authenticity*: Conviction that God has called us to reflect exteriorly our inner life of faith in our daily living
2. *Respect*: Affirming each person's God-given dignity and uniqueness.
3. *Courage*: Inspired by this gift of the Holy Spirit, we proclaim and live the Word of God fearlessly and devotedly.
4. *Commitment*: Individually and collectively, we are steadfast to the team and its purpose.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- In conjunction with PG Team, executes a 12-month plan to promote and advance the number of planned giving donors at both the local and the larger Church levels.
- Works closely with the Development Administrator to facilitate partnership with the Data Center to track, record, and value all expectancy, pending, and matured planned gifts.
- Assists the President in engaging the Board of Directors, Bishop, and pastors in cultivation as appropriate and stewardship and recognition.
- Establishes annual goals and strategies to acquire and cultivate donors – especially as it relates to the Vivos Christi Giving Society.
- Researches, identifies, cultivates, solicits, and stewards planned giving prospects through face-to-face visits, calls, written communications, e-mails, and direct response tools to acquire immediate, deferred, and future planned gifts (goal maintaining 100-125 prospects per year).
- Stewards existing members of the Vivos Christi Society and administers continued communication with these individuals.
- Monitors and understands all applicable state and national gift annuity, regulations, and requirements.
- Develops Charitable Gift Annuity proposals and contracts using PGCalc.
- Responsible for the full range of activity required to administer matured planned gifts including status through the probate process communications with attorneys, trust officers, and personal representatives, tracking accountings of gifts.
- Plans and executes events supporting the Vivos Christi Society.
- Plans, promotes, and executes Planned Giving committees and set annual goals for cultivation, solicitation, and gratitude for Planned Gifts for targeted parishes.
- Markets PG communications for age demographics and parish / school needs.
- Serve on Diocesan boards and committees when appropriate and represent the Diocese of Orlando and the Foundation in national forums.
- Other duties as assigned.

### QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



### EDUCATION and/or EXPERIENCE

- Demonstrated success in planned giving with five (5) years of comparable experience that includes event management.
- Bachelor's degree, JD preferred.
- Certified Fund Raising Executive credential or equivalent preferred.
- Bilingual in Spanish preferred.
- Active member of a Catholic parish preferred.
- Experience with endowment and investment portfolios preferred.
- High level of discretion and ethics including compliance with Donor Bill of Rights and Canon 1262
- Computer literate with experience in Raisers Edge and Proficiency with Microsoft Office required.
- Ability to work with diverse groups of people in an atmosphere of collaboration and service.
- Excellent written and oral communication skills, highly organized, self-directed and self-motivated.
- Possess demonstrated ability to work in a church-related as well as service-oriented environment.
- Superior experience with developing relationships.
- Willing to travel 50% of the time and nights and weekends as needed.
- Ability to work with a Catholic environment.

### LANGUAGE SKILLS

Ability to read, analyze, and interpret common journals, articles, and periodicals. Must have outstanding problem-solving skills. Excellent communication and interpersonal skills required.

### MATHEMATICAL SKILLS

Ability to apply routine mathematical concepts such as addition, multiplication, and division.

### REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions.

### PHYSICAL REQUIREMENTS

Position requires walking, sitting for extended periods of time, bending, stretching, and stooping. Repeated use of hands, fingers, wrists, and arms. Must be able to see up close as well as from afar. Job incumbent must also possess the ability to hear and communicate both verbally and in writing, in person and via telephone and electronic communications.

### Application Instructions:

Qualified candidates may submit a cover letter and resume and a completed Application for Employment to Kimberlee Riley, President, The Catholic Foundation of Central Florida:

via email: [kriley@cfocf.org](mailto:kriley@cfocf.org)

via mail: 50 E. Robinson Street, Orlando, FL 32801

No phone calls, please

Employment Applications may be located here: <https://www.orlandodiocese.org/wp-content/uploads/2016/05/Employment-Application-2016-Fillable.pdf>

Thank you for your interest.