



Diocese of St. Augustine Position Description

Position: Charitable Gift Advisor

FLSA: Exempt

Reports to: Executive Director, Catholic Foundation

Department: Catholic Foundation

Effective date: 8/3/2022

General Summary:

The Charitable Gift Advisor will continue to develop and implement the planned and major giving programs of the Catholic Foundation. This position is responsible for identifying new prospects, cultivating current prospects, developing enduring and ever-deepening relationships with donors and legacy society members, and communicating the foundation's mission to the faith community and its partners in mission (parishes, Catholic schools, diocesan ministries, donors, community partners, and advisors).

Essential Duties and Responsibilities:

- Develops, organizes, directs, and implements strategy to segment, prospect, cultivate, solicit, and grow the planned and major giving programs.
- Researches, identifies, cultivates, and solicits individual planned and major gifts benefiting the Catholic Foundation and Diocese of St. Augustine and its entities through endowed, cash gifts, and approved non-cash gifts. When appropriate, connects individual donors with development directors affiliated with donor's interests and motivation.
- Transitions individual giving prospects in an appropriate and timely fashion towards solicitation and closure of gifts and gift plans.
- Works collaboratively with the Catholic Foundation's partners in mission, including the diocesan Office of Development & Stewardship, educating them on the importance of planned giving and establishing initiatives to promote planned gifts. Encourages and supports pastors, principals, development directors, and others to invest in and grow endowed funds at the Catholic Foundation.
- Organizes seminars at parishes and schools regarding planned giving, endowment giving, and the importance of wills and estate planning. Collaborates with estate planning and financial planning professionals to present various programs. Participates in other speaking opportunities when presented.
- Prepares correspondence, reports, proposals, and marketing materials as needed.
- Builds and maintains existing donor relationships, stewarding members of the legacy society.

- Updates the donor database regularly, with contact information and donor interactions.
- Creates a positive, respectful, and professional reputation for the organization.
- Builds and grows the network of estate planning professionals by establishing professional relationships. Organizes and directs the Planned Giving Advisory Committee, a group of professionals established to serve as ambassadors for the benefit of planned giving for the Diocese of St. Augustine.
- Monitors known bequests as they move through the probate process, secures, and maintains obituary records of benefactors, contacts personal representatives as needed, prepares acknowledgement communications for family members and relatives upon receipt of the bequest gift.
- Maintains active memberships in the National Association of Charitable Gifts Planners (NACGP) and the local chapter (Planned Giving Council of NE Florida) and keeps up to date on planned giving issues, estate planning laws, and trends.
- Performs other related duties as assigned by the executive director.

Knowledge, Skills, and Abilities Required

- Bachelor's Degree required with three to five years' fundraising experience in planned and estate giving preferred.
- Must be a practicing Roman Catholic possessing the ability to respect, promote, accommodate, and not be in conflict with the mission, moral and social teachings, doctrines, and laws of the Roman Catholic faith and must be a Catholic in good standing with the Church and active in a parish.
- Must consistently demonstrate a positive, friendly, respectful, and caring attitude with colleagues, the public, and all one serves in word and deed; projecting a welcoming atmosphere to all who interact with the Catholic Foundation.
- Familiarity and fluency with the use of technology and the ability to know how to team with others to creatively use technology in foundation goals, marketing, media relations, and to continually stay abreast of how other organizations, particularly dioceses use technology, marketing, and the media to communicate, and reach our partners and community.
- Pursues this ministry with energy, drive, and a need to produce results, especially in the face of resistance or setbacks. Must be flexible, self-confident, assertive, and persuasive.
- Required to have excellent presentation, verbal, and written communication skills. Ability to produce concise reports and recommendations, make presentations to varied groups, and articulate and inspire commitment to a shared vision.
- Must be a goal oriented and self-motivated individual who can demonstrate accountability, initiative, creativity and focus in a rapidly changing and intellectually stimulating environment. Must be able to organize and prioritize work, be proactive, resolve complex problems, follow through, and simultaneously manage multiple priorities.
- Ability to respect and value the cultural richness that makes up the Church and society and strives to celebrate commonalities and differences among various groups.

- Must be able to maintain confidential information, exercise good judgment and work independently as well as in a team environment; this role carries independent discretion and authority in matters very significant to the Catholic Foundation, its board, and the executive director.
- Must maintain a valid driver's license.
- Must successfully pass the required criminal background check prior to employment and every five years.
- Proficient with information technology including Microsoft Office Suite, social media usage, web site contributor level skills.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, vendors, employees, and the general public.

MATHEMATICAL SKILLS

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand; walk; sit; use hands to finger, handle, or feel; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must regularly lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision, distance vision, and ability to adjust focus.

WORKING CONDITIONS

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate. Flexibility to work evenings and weekends, when necessary, and ability to travel and drive one's own vehicle to various diocesan locations.

Receipt and Acknowledgement

I acknowledge that I have been given a copy of this job description. I have read it and understand it. I am responsible for complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

This job description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

I understand and agree that the job description is presented as a matter of information only and is not to be construed as a contract between the Diocese of St. Augustine and its employees.

Employee Printed Name

Employee Signature

Date

Executive Director, Catholic Foundation

Date

CFO & Secretariat Leader for Temporal Goods

Date

Approved by Director of Human Resources

Date

All new or revised position descriptions must be approved by the Director of Human Resources