

## **DIRECTOR OF PHILANTHROPY**

TITLE: DIRECTOR OF PHILANTHROPY  
SUPERVISOR: VICE PRESIDENT, CHIEF DONOR SERVICES OFFICER  
FLSA STATUS: EXEMPT  
DATE PREPARED: AUGUST 30, 2022

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### SUMMARY

The Director of Philanthropy assists the President, CEO, Board of Directors and Diocesan leadership to fulfill The Foundation's enormous potential for mission and ministry. The Director of Philanthropy is a member of the Donor Services team and responsible for developing strategies for identification, cultivation, solicitation and stewardship of donors with a focus on the donors' philanthropic aspirations, blended gifts, planned giving and multi-year impact supporting The Foundation and Catholic-compliant organizations through endowment funds, donor advised funds and other charitable giving vehicles.

**As a primary partner to the Diocese of Orlando our team embodies both organizational values which lay the foundation for the work performed by our employees.**

### **The Diocese of Orlando values:**

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.

### **The Catholic Foundation of Central Florida values:**

1. *Faith-filled passion:* We nurture our faith to inspire others to transform lives through charitable giving.
2. *Collaboration:* Through partnerships, we leverage community resources to maximize impact.
3. *Stewardship:* We recognize that all gifts are from God and we are called to honor donor intentions and use prudence to return gifts with increase.
4. *Transparency:* We are open and honest in our communications to provide access to information.
5. *Servant Leadership:* We listen and learn from our community and invest in initiatives to meet their needs.
6. *Impact:* We engage donors in serving the needs of our community and advancing ministries of the Catholic Church.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following with other duties which may be assigned:

- Engages in relationships through a portfolio of 125-150 donors and prospects.
- Participates in each step of the donor pipeline including: identification, qualification, cultivation, stewardship and recognition.
- Conducts research ensuring alignment of donor interests with Diocesan ministries and identifies prospective donors and fundraising potential.
- Researches, identifies, cultivates, solicits, and stewards major and planned giving prospects through face-to-face visits, virtual meetings, calls, written communications, e-mails, events and direct response tools to acquire immediate, deferred, and future major and planned gifts.
- Develops individual donor solicitation and stewardship plans and refines as needed to advance the number of major gift and planned giving donors at both the local and larger Church levels and to assure effectiveness, including identifying Board of Directors, staff and partner engagement.
- Collaborates with the Vice President, CDSO to establish annual goals and strategies for blended and planned giving and gift levels of \$10,000+ and recognition through annual enrollment in the different giving societies.
- Maintains expert knowledge of specific charitable giving vehicles including but not limited to current IRS Estate Tax Codes, Charitable Gift Annuities, Charitable Remainder Trusts, Donor Advised Funds and Endowments.

- Develops and monitors timely reports relative to major and planned gift strategies and benchmarks.
- Works closely with the Gifts & Grants Coordinator to facilitate partnership with the Data Center to track, record, and value all expectancy, pending, and matured planned gifts.
- Ensures documentation of charitable intent, records all interactions with donors and understands and maintains compliance with all governing and ethical policies that affect donors, particularly Canon 1262 and Donor Bill of Rights.
- Engages the President & CEO, Board of Directors, Bishop and Pastors in donor stewardship and recognition.
- Provides direction, as necessary, to vendors relative to major and planned giving for the Foundation.
- Monitors and understands all applicable state and national gift annuity, regulations, and requirements.
- Coordinates, plans, promotes, and executes the Foundation's Giving Circles.
- Works with Donor Services team to design and offer presentations, consultations, and advancement expertise for fundraisers, staff, and Pastoral staff and diocesan partners.
- Maintains confidentiality of financial, contract and donor information.
- Works with members of the Foundation Board's Development Committee to determine appropriate instruments for blended and planned giving gifts and develops applicable proposals and contracts for the various instruments i.e. Charitable Gift Annuity, Irrevocable Trust, etc.
- In collaboration with the Foundation marketing and the Diocesan communication teams, market and promote blended and planned giving opportunities for age demographics and parish/school needs.
- With the Donor Services and Events Coordinator, plan and execute Diocesan-wide programs to promote legacy giving through Endowments, Donor Advised Funds, Reserve Funds, bequests, Charitable Gift Annuities, Charitable Remainder Trusts, etc.
- Serves on Diocesan boards and committees when appropriate and represents the Diocese of Orlando and the Foundation in regional and national forums.
- Embraces the Foundation's mission and vision and is an example of the organizational values.

#### 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 fundraising with five to seven (5-7) years of high-level comprehensive development experience; specifically with major and planned gifts;
- Bachelor's degree Business Administration, Liberal Arts, Non-Profit Administration or similar field required, Master's or JD preferred; or equivalent work experience, with five or more years of fundraising leadership in a complex corporate, academic and/or nonprofit setting;
- Experience with moves management and donor cultivation, stewardship and recognition;
- Experience with endowment and investment portfolios preferred;
- Experience with inter vivos planned gifts including legal requirements for charitable gift annuities and other charitable giving vehicles.
- Experience with standard procedure and legal requirements in planned gift processing especially with testamentary gifts.
- Superior relationship and leadership skills;
- Community or Catholic Foundation or diocesan experience a plus;
- Proficiency with Microsoft Office required and Blackbaud NXT and Luminate software preferred or other constituent/donor relationship management system;
- Excellent presentation skills (virtual and in person);
- Strong decision-making ability and attention to detail;
- Must be highly organized, accurate and detail oriented;
- Must be able to meet deadlines and set priorities;
- Solution oriented and able to maintain the goodwill and reputation of the team;
- Ability to map, manage and track projects that involve multiple stakeholders;
- Ability to work independently and to take initiative and participate as an effective team member;
- Excellent written and oral communication skills as well as effective personal interaction, influence and experience working with diverse groups;
- Possess demonstrated ability to work in a church-related as well as service-oriented environment;
- High level of discretion and ethical approach to fundraising, including adherence to Canon 1262 and the Donor Bill of Rights;

- Bi-lingual (Spanish) preferred;
- CFRE credential and/or CAP preferred;
- Must be a practicing Catholic;
- Ability to interact with staff (at all levels) in a fast-paced environment, sometimes under pressure, remaining flexible, proactive, resourceful and efficient, with a high level of professionalism and confidentiality;
- Strong customer service orientation;
- Ability to travel local and Diocesan-wide as well as regionally and nationally and work evenings and weekends as required for special events, meetings, travel, etc;
- A passion for community involvement and philanthropy, infectious enthusiasm, and an entrepreneurial spirit.

#### CATHOLIC FAITH

Requires an appreciation and respect for the Catholic Church and its teachings. Employees must conduct themselves in a manner that is consistent with and supportive of the mission and purpose of the Church. Their public behavior must not violate the faith, morals or laws of the Church or the policies of the Diocese.

#### 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.

#### ACKNOWLEDGEMENT

The preceding 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.

To apply, please visit: <https://recruiting.paylocity.com/Recruiting/Jobs/Details/2134250>