

THE DIOCESE OF COLORADO SPRINGS

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JOB DESCRIPTION

Job Title: Catholic Foundation Advancement Officer **Number:** FO372

Reports To: Director of Stewardship and Development

Department: Office of Stewardship and Development

Full Performance Period: 6 mos. **Eligible for Overtime:** No (Exempt)

Positions Supervised: None

General Purpose: To advance the spiritual and religious mission of the Diocese of Colorado Springs by advancing the Catholic Foundation within parishes and diocesan institutions, and building and maintaining ongoing and faithful donors through planned giving

Essential Duties and Responsibilities:

- Implement and maintain campaigns, programs, and activities that increase endowments for the Diocese and the Foundation
- Review all existing endowments within the Foundation and ensure donor intentions are being observed and legal requirements are being met
- Update Foundation Endowment Gift language as needed to comply with national best practices
- Increase the number of endowments each year in accordance with goals set by the Foundation Board and Director of Stewardship and Development
- Implement a planned giving program to secure bequests, beneficiary designations, and insurance policies for the Foundation, parishes, schools, and diocesan institutions and offices
- Conduct meetings with donors to learn about their interests and goals in supporting diocesan parishes and ministries and educate them about the work of the Foundation
- Develop and maintain a portfolio of pastors and at least 50 current and potential benefactors
- Actively solicit planned gifts for the Foundation, Diocese, and its parishes and ministries
- Record all contacts, correspondence, and activity with potential and current benefactors in the diocesan Raiser's Edge database
- Educate and form pastors, pastoral leaders, parishioners, and volunteers in planned giving efforts and endowments
- Facilitate paperwork and other activities to complete planned gifts
- Create marketing materials for the Foundation and planned giving program
- Set goals for planned giving program and report progress to the Foundation Board
- Maintain and promote the Catholic Legacy Society
- Maintain a list of attorneys, accountants, and financial planners to recommend to donors
- Remain current in legal, accounting, and tax matters pertaining to planned giving
- Attend diocesan and community events as required
- Conduct 100-150 benefactor visits each year (10-15/month)
- Other duties as assigned

This description is not intended, and should not be construed, to be an exhaustive list of all responsibilities, skills, efforts, or working conditions associated with this job. It is intended to be an accurate reflection of the principal job elements essential for making compensation decisions.

Job Description For Catholic Foundation Advancement Officer (continued)

Decision Making and Supervisory Responsibility:

HIRING				
ASSIGNING/SCHEDULING WORK	R			
MONITORING/CONTROLLING WORK	R			
DISCIPLINE				
PERFORMANCE EVALUATION				
SALARY RECOMMENDATIONS				
DISMISSAL				
BUDGET RESPONSIBILITY	Purchasing authority for exp. up to \$500; handles day-to-day budget activity			
PROPERTY RESPONSIBILITY	Responsible for proper handling of some donations, and equipment housed in office			
CONFIDENTIAL INFORMATION	Responsible for the security of highly confidential information			

I indicates Input only

R indicates responsibility for recommending a course of action requiring one other approval

F indicates responsibility for the Final Decision

Minimum Requirements:

Education:

- Bachelor's Degree

Experience:

- 3-5 years of experience in development efforts ideally related to Catholic ministry, foundation, or educational advancement
- Knowledge of planned giving practices
- Practicing Catholic with ethical standards, personal integrity and conduct consistent with the morals and teachings of the Catholic Church, is required.

Knowledge, skills, and abilities:

- Ability to maintain confidentiality
- Ability to work with a high degree of independence, and juggle various projects at once, while maintaining a clear view of how each project supports the organization's mission
- Self-starter who can work independently and collaboratively
- Hard worker with high energy
- Ability to establish and maintain positive professional relationships with diverse constituent groups of all ages and backgrounds
- Excellent verbal and written communication skills
- Knowledge of fundraising principles and procedures preferred
- Strong computer skills and ability to become proficient in relevant software
- Ability to make good judgments and perform effectively under pressure
- High degree of professionalism and discretion