

CATHOLIC FOUNDATION
of Northwest Pennsylvania

POSITION DESCRIPTION

POSITION TITLE **DEVELOPMENT DIRECTOR / PLANNED GIVING SPECIALIST**

REPORTS TO **EXECUTIVE DIRECTOR**

FULL TIME X **PART TIME** **EXEMPT X** **NON-EXEMPT**

The duties of this position meet the stated FLSA criteria which qualify for the administrative exemption.

OBJECTIVE

Lead a variety of development projects as assigned including the initiation of an effective planned giving program. Establish new and strengthen existing relationships with major gift prospects and donors, diocesan clergy and leaders of Catholic organizations. The Director is a resource for colleagues and constituents in charitable gift planning.

MAJOR RESPONSIBILITIES

1. Lead the development and implementation of a planned giving program.
2. Collaborate with Foundation team to build and maintain qualified prospect lists and files and set annual fundraising goals.
3. Personally contact, develop and service prospects to secure planned gifts/investments; establish new and build existing endowments.
4. Prepare and present appropriate proposals.
5. Record, report and maintain information files on all prospect development contacts and responses.
6. Steward donors/investors who have already given/invested or announced a commitment to a planned gift.
7. Generate program reports, present updates to the board and others.
8. Establish working relationships with and actively engage with agents of wealth (attorneys, accountants, trust officers, financial advisors, etc.)
9. Prepare or secure and distribute promotional materials related to planned giving.
10. Coordinate planned gift program objectives with all Foundation outreach programs.
11. Exercise discretion; uphold the AFP Donor Bill of Rights and Code of Ethical Standards.

QUALIFICATIONS

- Proven track record and history (minimum 5 years) in fundraising, finance, sales or marketing
- Working knowledge of fundraising practices
- The ability to lead, work in a team setting and work independently
- Functional knowledge of planned giving (estate planning, tax laws, wills, trusts, etc.)
- Excellent verbal and written communication skills
- Capable of handling numerous tasks at once and still meeting deadlines
- Agility to thrive in an evolving organization
- Inspired by and willing to support the mission of the Catholic church/ministries

Education: Bachelor's degree; financial field preferred

COMPETENCIES

- Proficient in Microsoft Office
- Experience with donor databases helpful
- Able to develop and maintain successful relationships
- Results oriented
- Works well independently and as part of a team
- Works well in an environment of change

PHYSICAL REQUIREMENTS

- Ability to work at a computer
- Ability to lift 25 pounds occasionally
- Ability to travel within the diocese and beyond as determined related to program and gift development