



**ADVANCEMENT FOUNDATION**  
*Supporting the Catholic Diocese of Fort Worth*



## **Associate Director of the Foundation**

### **Position Description**

Updated Oct, 2016

#### **Employment Information**

Employment Date	Employment Category	<b>Exempt</b> FLSA Classification
<b>Semi-Monthly</b> Pay Frequency		Scheduled work week

#### **Job Information**

Job Date	<b>Associate Director of the Advancement Foundation</b> Job Title	Program Name
Entity Name	<b>Paula K. Parrish, CFRE</b> Supervisor	

*The principal duty of all employees is to assist in the mission of the Church in the Diocese of Fort Worth. This job description is not designed to cover or contain a comprehensive listing of all activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.*

#### **Essential Functions of the Associate Director are:**

- Manage all Annual Appeals. These include but are not limited to:
  - ADA- Annual Diocesan Appeal;
  - All National and Diocesan special collections in all parishes;
  - Annual Memorial Fund appeals;
  - New-School Tuition Assistance Second Collection
  - Other annual giving programs as assigned.
- Organize a committee to oversee all annual appeals in the Diocese.
- Communicate and interact with the pastors of all the parishes.
- Speak at Deaneries and individual parishes about upcoming appeals.
- Create all marketing and solicitation collateral and materials for each appeal.
- Establish goals, timelines and strategies for each appeal.
- Establish appropriate events per appeal.

- Prepare analytical and comparative history reports for the Foundation, including ROI and CRD reports on each appeal.
- Sustain the Planned Giving Program.
- Establish and manage a Planned Giving Advisory Committee.
- Market and educate parishes and schools about Planned Giving for their long-term success and sustainability.
- Maintain an accurate roster of members of the Legacy Society.
- Prepare and execute education seminars/workshops to inform Pastors and their parishioners about Planned Giving vehicles.
- Plan and implement an annual Legacy Society event.

### **Job Duties**

- Prepare the budgets, case, solicitation and recognition materials, publishing and distribution of all collaterals for each annual appeal.
- Prepare timely reports on all activities for each annual appeal.
- Develop a communication plan for each annual appeal. Include notices for Social Media, the Web pages, NTC, and work with the Communication office to implement.
- Conduct a spring PHONATHON. Target LYBUNTS in the ADA Campaign.
- Select and train parish captains in the ADA Campaign.
- Prepare all marketing and communication materials for annual giving Campaigns.
- Maintain matching gifts information and distribute as appropriate.
- Create a plan to annually solicit donors and family in each Memorial Fund.
- Together with appropriate Diocesan, Foundation, Parish and School leadership, conduct face to-face solicitations of select annual giving donors.
- Keep up to date with Annual Appeal methodologies and best practices inside and outside the Diocese.
- Coordinate with the USCCB about annual national Campaigns. Communicate those dates to the parishes.
- Work collaboratively with team members of the Advancement Foundation and assist with other functions and duties as assigned by the Executive Director and/or Diocesan Leadership.
- Prepare timeline, budget, and collateral materials for the Planned Giving program.
- Keep up to date on other Diocese's Planned Giving programs.
- Conduct an information session for Bank Trust Officers, estate planners, lawyers, CPA's and financial advisors.
- Establish and educate a Planned Giving Advisory Committee.
- Prepare quarterly reports on advancements in Planned Giving programming.
- Create a brochure to distribute for prospect recruitment.
- Prepare updated report of Who's Who in the Legacy Society.
- Conduct informational seminars and workshops for prospects to the Legacy Society.
- Cultivate and maintain frequent contact with members of the Legacy Society.
- Obtain copies of pertinent Wills and Declaration of Intent forms and put on the Media Tab of Raiser's Edge for each member in the Legacy Society.
- Host an annual recognition event for members in the Legacy Society.

## **Qualifications**

- At least seven years of hands-on experience with a successful track record in annual giving and planned giving programs. Knowledge and background in advanced Development processes and implementation of best practices.
- Bi-lingual in English and Spanish strongly preferred.
- Practicing Catholic with a strong desire to serve the Catholic Community of the Diocese of Fort Worth required.
- Baccalaureate degree from an accredited college or university required.
- Self-starter capable of creating and implementing approved programs with minimal supervision.
- Ability to communicate professionally and effectively, both verbally and written.
- Ability to develop productive and collaborative relationships that are mutually-satisfying with pastors, parishioners, educators, donors and co-workers.
- Must be available to attend events and meetings, which will include some nights and weekends.
- Experience with Microsoft Office software required. (Word, Excel, PowerPoint, etc.).
- Experience using Raiser's Edge software strongly preferred.
- Ability to meet deadlines, work well under pressure, manage multiple priorities and maintain confidentiality.
- Must have a valid driver's license and vehicle liability insurance. Must have ability to use one's own vehicle (mileage is reimbursed) and/or company vehicles for business travel.

## **Working Conditions:**

- Travel within the boundaries of the Diocese of Fort Worth. Mileage is compensated.
- Frequent computer and telephone usage.
- Office environment includes frequent sitting, standing, walking, reaching and grasping.
- Position also requires visits to parishes, schools, venues and meetings held offsite from the Advancement Foundation.
- Ability to lift, push, and pull up to 35 pounds without assistance and up to 60 pounds with assistance.
- Nights and weekends required as needed.

## **Signatures:**

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Employee

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Supervisor

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Date