



Annual Giving Director

Updated on August 10, 2016

Employment Information

Employment Date	Full Time Employee Employment Category	Salaried Exempt Employment Type
Semi-monthly Pay Frequency	Full Time Scheduled work week	

Primary Job Information

Job Date	ANNUAL GIVING DIRECTOR Job Title	Advancement Foundation Department Name
Catholic Center Entity Name	Paula K. Parrish, CFRE 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 Annual Giving Director of the Advancement Foundation are:

The Annual Giving Director is responsible for managing all annual appeals including the Annual Diocesan Appeal, all national and diocesan special collections, Annual Memorial Fund appeals, and other annual giving programs. The Director will also be responsible for managing and growing the Planned Giving Program and the Legacy Society.

Job Duties:

Manage, direct and implement all **ANNUAL GIVING PROGRAMS**.

- 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.*

- Establish and manage a committee to oversee all annual appeals in the Diocese.
- Personally get to know the pastors of all the parishes.
- Speak at Deaneries and individual parishes about upcoming appeals.
- Prepare the budgets, case, solicitation and recognition materials, publishing and distribution of all collaterals for each annual appeal.
- Establish goals, timelines and strategies for each 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.
- Establish appropriate events per appeal.
- 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.
- Select and train parish captains in the ADA Campaign.
- Conduct a spring PHONATHON. Target LYBUNTS in the ADA Campaign.
- Prepare analytical and comparative history reports on all activities, including ROI and CRD reports on each appeal.
- Maintain matching gifts information and distribute as appropriate.
- 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.

Manage and grow the **PLANNED GIVING PROGRAM.**

- Overall Program
 - Sustain the Planned Giving Program.
 - Establish, educate, and manage a Planned Giving Advisory Committee.
 - Market to and educate parishes and schools about Planned Giving for their long-term success and sustainability.
 - 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.
- Prepare quarterly reports on advancements in Planned Giving programming.
- Create a brochure to distribute for prospect recruitment.
- Publish the quarterly Planned Giving Newsletter with Stelter. Sustain the relationship with Stelter to update web page.
- Legacy Society
 - Maintain an accurate roster of members of the Legacy Society. Prepare updated report of Who's Who in the Legacy Society.
 - Prepare and execute education seminars/workshops to inform Pastors and their parishioners about Planned Giving vehicles.
 - Plan and implement an annual recognition Legacy Society event.
 - 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.

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 in writing.
- 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 on a regular basis to promote giving opportunities at parishes, schools, venues, and meetings held offsite from the Advancement Foundation. Mileage is compensated.
- Frequent computer and telephone usage.
- Office environment includes frequent sitting, standing, walking, reaching and grasping. 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:

Employee

Supervisor

Date

Date

The contact regarding this position is:

Paula Parrish, CFRE, Executive Director, Advancement Foundation
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