

POSITION DESCRIPTION



I. General Information

- A. **TITLE:** Philanthropy Specialist
B. **REPORTS TO:** Foundation President
C. **CLASSIFICATION:** Full Time
D. **STATUS:** Exempt

II. Purpose

The Philanthropy Specialist is a prime driver for the efforts of the Catholic Foundation of Eastern Montana (Foundation) to build permanent endowments in support of the Catholic Faith and Catholic Ministries in our diocese.

This position requires significant interaction with potential donors, current donors, and fund beneficiaries (including Catholic parishes, Catholic schools, Catholic nonprofit organizations, and the Pastoral Center of the Diocese of Great Falls-Billings).

This dynamic professional will cultivate, sometimes solicit, and always steward charitable gifts from individuals and families, aimed at the long-term care of the Church. The ideal candidate will have a record of experience and success in nonprofit development/fundraising.

III. Primary Duties and Responsibilities

A. Duties

- Builds relationships with Catholics throughout the Diocese of Great Falls-Billings.
- Tells the Foundation's story and promotes the mission.
- Understands the basics of planned giving.
- Meets with professional advisors (accountants, attorneys, investment representatives, etc.) and develops a network of Catholic allied professionals
- Develops ways to better serve donors and fund beneficiaries.
- Makes oral and visual presentations to groups of Catholics.
- Talks with Catholics one-on-one.
- Stewards relationships with donors.
- Some administrative work is required, especially for yourself.
- Sets annual performance goals in consultation with and approved by the Foundation President.
- Generates quarterly reports of program performance.
- Prepares written proposals and informational packets to secure major gifts.
- Asks for gifts when needed.

- Assists in managing two donor organizations: *Upon this Rock Legacy Society* and the *St. Joseph Movement*.
- Offers strategies for the Foundation President, Foundation Board members, the Bishop, and/or clergy to help assist in donor identification, cultivation, solicitation and stewardship.
- Accurately and thoroughly records donor/prospect activity into donor database in a timely manner.
- Ensures gifts received are designated in accordance with the donor's intent, as initially agreed by the Foundation.
- Maintains donor confidentiality at all times.
- Performs other duties as assigned.

IV. Qualifications

A. Education, Experience, and Characteristics

- Must be a practicing Catholic in good standing.
- Must care deeply about the Catholic Church and its future.
- Highly responsible and action-oriented.
- Strong work ethic, enthusiastic personality, self-confidence, professional demeanor.
- Attentive to details.
- Pleasant and upbeat personality.
- Minimum of three years of development/fundraising experience is required. Preference is given to length of service and track record and major gift and/or deferred gift/planned giving experience.

B. Knowledge, Skills and Abilities

- Ability to articulate persuasively the need for endowed philanthropy within the Catholic Church.
- Expertise in relationship-building.
- Top-notch listening skills.
- Exceptional interpersonal skills and ability to work collaboratively.
- Ability to multi-task effectively.
- Excellent skills in oral and written communications.
- Strong organizational skills.
- Proficient in computer and Internet usage including Excel, Word, PowerPoint, and donor software.
- Is knowledgeable of and complies with all applicable local, state and federal laws and regulations governing fundraising activities.

V. Working Conditions

1. Preferred job location to be at the Foundation's office in Great Falls, Montana; other locations may be considered.
2. Must have and maintain a valid driver's license.
3. Weekend and evening work often required.
4. Travel within the Diocese is likely required up to 75% of the position.
5. No supervisory responsibilities.

To apply for the position:

Send a cover letter explaining your interest in the position, your current resume, and at least three professional references of people not related to you:

By email: judy@catholicfoundationmt.org

By mail:

Judy Held, President
Catholic Foundation of Eastern Montana
PO Box 1345
Great Falls, MT 59403

Position is open until filled.