



Position Specification

Orange Catholic Foundation & Roman Catholic Diocese of Orange

Director of Development - Catholic Schools

The Mission of the Diocese of Orange:

Go, therefore, and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit.

The Mission of the Orange Catholic Foundation:

The Orange Catholic Foundation is an autonomous, pious foundation that works in collaboration with members of our Diocese of Orange to raise, manage, grow and grant funds supporting all aspects of the Catholic faith following each donor's intent.

The VISION:

Our vision is to establish and support dynamic, vibrant parishes and schools which welcome all to live the Gospel with faith, joy, charity and unity. Our Diocese encourages each person to have an active life of faith that is integrated and woven into the fabric of their daily lives through the community and sacramental life of the Church.

The role of the Office of Catholic Schools is to embrace the Diocesan vision as we serve, motivate, challenge and lead our Catholic Schools to be strong in Catholic identity - spreading the message of the Gospel, while developing the student's academic, social, physical and spiritual depth within our preschools, elementary, and secondary institutions.

Through the inspiration of the Holy Spirit, the Orange Catholic Foundation strives to become a premier, nationally-recognized steward of Catholic philanthropy in carrying out Christ's work to sustain and enhance all aspects of Catholic life for the entire community in the Diocese of Orange.

BACKGROUND:

The Director of Development for Catholic Schools is a new position who will join an existing team of dynamic advancement professionals, volunteers and staff at the Orange Catholic Foundation. This position will work in collaboration with the leadership team at the Diocese of Orange who share a commitment to supporting and sustaining Catholic schools in our Diocese.

This position was recommended following an extensive five-month strategic planning review of our Catholic schools and is viewed as a key component to improving the financial sustainability of our Catholic schools especially in low income areas where families cannot afford tuition and financial resources are stretched thin.

The Diocese of Orange was created in 1976 as an outgrowth from the Archdiocese of Los Angeles. It was a small organization at the time supporting approximately 40 parishes and 500,000 Catholics in a rapidly growing Orange County.

The County of Orange growth has exploded over the past 40 years and today the Diocese supports 62 parishes, 41 schools: 2 co-ed high schools; a girl's high school; 31 parish elementary schools; and 7 additional independent Catholic schools, in a community of 1.3 million Catholics, educating 18,000 students. Orange County, like the Diocese, has seen its evolution from a suburban community of Los Angeles to a much more urban, multi-cultural and diverse environment. This transformation impacts the nature of parish life and schools in profound ways.

The community demographics have changed along with this growth. Large immigrant populations from Latin America and Asia have migrated to Orange County. The Diocese has responded with specialized programs to serve these faith based communities. Many parishes and schools have become predominantly Hispanic and/or Vietnamese in character and the Diocese has responded with multicultural priests and teachers who understand and can serve these communities.

Catholic education is the lifeblood of the Church and Diocese of Orange but this includes many challenges and stressors, which are opportunities that are given to us by the Lord here in our local Church! The Roman Catholic Bishop of Orange, himself a product of Catholic education and having personally seen the transformation which Catholic education can offer families and students in his visits to the schools, has made the sustainability of our schools one of his top priorities.

A new Superintendent of Schools, Dr. Erin Barisano, recently joined the Diocese in July of 2018. She seeks to further advance the work of the Holy Spirit in the lives of our students and to build a solid management team to maximize our schools' ability to help develop students physically, academically, socially, and spiritually in their faith journey. Dr. Barisano will need additional financial resources to implement her vision and will require a strong, experienced development officer who has a passion for Catholic education and who has the business acumen and sales and marketing prowess to create new and grow existing sustainable revenue streams across the Diocese by working in close partnership with our local principals and pastors in enhancing school endowment funds and sustainable annual giving and expanded major gift programs.

The Orange Catholic Foundation was established in 2000 and serves as the philanthropic arm of the Diocese of Orange. The Foundation's institutional presence helps to sustain financial stewardship in parishes, schools and ministries of the diocese. The foundation is a financially autonomous entity governed by an independent board of directors comprised of lay and religious leaders who are practicing Catholics in the Diocese of Orange. The foundation is led by Cynthia (Cindy) Bobruk, executive director and president, who has three decades of advancement experience in public higher education,

independent school (PreK to 12 advancement) and most recently as the CEO of the Orange Catholic Foundation for past 8 years.

The Orange Catholic Foundation has more than \$25.1 million in funds invested in 66 funds (including 55 endowment funds, 10 special interest funds (quasi-endowments), and 1 scholarship fund benefitting Catholic education in the Diocese of Orange. This generates approximately \$1.25 million in distributable income to the schools annually.

Each of the 31 diocesan elementary schools and 3 diocesan high schools now has an endowment and/or special interest fund (also known as “quasi-endowment”) established at the Orange Catholic Foundation for the benefit and sustainability of our Catholic schools. These funds range in value from \$23,000 to more than \$2.2 million and represent more than 64% of the foundation’s total endowment and quasi-endowment investment pool

The first diocesan capital campaign, For Christ Forever, conducted in the parishes in 2013 raised more than \$127 million in pledges and gifts of which almost \$15 million supported Catholic schools by growing the School Tuition Assistance Endowment to more than \$8.2 million and by investing in infrastructure improvements (air conditioning, facility improvements and technology) while supporting annual tuition assistance for the neediest schools in the diocese for the past 5 years.

For the 2017-2018 school year, the Orange Catholic Foundation provided tuition assistance grants totaling more than \$2.5 million to 27 Catholic elementary schools in our diocese. More than 58% or \$1.5 million of these funds supported the 8 neediest schools in Santa Ana, La Habra, Garden Grove, Anaheim and Stanton.

Position Summary:

The Director of Development for Catholic Schools will be a deeply involved frontline fundraiser and leader within the Orange Catholic Foundation and will work in close collaboration with the Superintendent of Catholic Schools and other leaders in the Catholic Schools Department. This position is tasked with creating and raising support for annual funds to benefit the schools both at a diocesan and individual school level as well as the continuation of soliciting both outright and estate gifts to increase the school endowment funds at the Orange Catholic Foundation for the benefit of these schools. Other special projects may be initiated based on the emerging diocesan strategic plan for Catholic schools as well as other special projects that may be initiated. Reporting directly to the Vice President of Philanthropy of the Orange Catholic Foundation (OCF) and working closely with the Superintendent of Schools and the Executive Director and President of the OCF, the Director of Development will be charged with developing nearly \$3 million in support (Endowment and Annual) for the Diocese’s schools each year.

Key factors contributing to the success of the Director of Development will be the ability to raise philanthropic support for the Diocesan Catholic Elementary Schools and its programs, and to develop

effective outreach and campaign strategies that connect with individual and institutional donors. As part of that effort, the Director of Development will work with other members of OCF and schools department to continually improve the fundraising support infrastructure and ensure that the organization can respond quickly, effectively, creatively and contextually to long term financial requirements, short term operating needs while respecting donor intent.

Primary Responsibilities:

Plans, designs and implements donor research and prospect management systems to identify leadership giving prospects/donors for Catholic schools in order to engage with donors in an appropriate and timely manner.

Acts as a consultant and coach to pastors, principals, school development directors and school volunteers regarding their individual school development strategies, identification and qualification of new prospects and existing donors and engagement and solicitation of donors including school parents, alumni and parishioners.

Develops and manages an annual expense budget supporting the school fundraising efforts and prepares monthly, quarterly and annual progress reports.

Identifies, enlists and recruits a Catholic schools advisory volunteer committee as part of the Orange Catholic Foundation and specifically charged with supporting fundraising plans and assisting with identification and outreach to potential and existing donors.

Provides leadership, supervision, and support to ensure the following key areas meet and exceed annual goals by collaborating, mentoring and developing new initiatives that raise funds through:

- Individual major donors
- Corporate sponsorships
- Philanthropic grant proposals
- Special Events and sponsorships with emphasis on the annual Conference on Business & Ethics

Identifies, qualifies and manages a portfolio of 100+ prospects including advisory committee members, and targeting corporations and foundations and major donors through cultivation and recognition efforts.

- This will be achieved by:
- Enlisting an advisory committee to serve as development volunteers for the schools advancement efforts
- Conducting at least 10 documented personal visits with existing or potential donors, per month
- Qualifying 15 or more new corporate, foundation or board prospects, per year
- Soliciting at least 25 prospects of \$25,000, per year
- Conducting 30 cultivation stewardship visits, including personal delivery of annual reports, per year

- Secure \$3 million in individual, corporate and foundation support for programs and endowments per year, with a preliminary goal of \$1.5 million in new gifts and commitments to programs generated by direct solicitations, \$500,000 of which is generated by new donor(s) to the Diocese or significant increase in support from existing donor(s).
- Collaborate with the Vice President of Philanthropy of OCF and the Executive Director of the Foundation on fundraising strategies, solicitations and stewardship efforts including managing a portfolio of donors with specific interest or affinity to support the Endowment goals; lead Endowment solicitations and serve as a pivotal member of the frontline fundraising team that raises support for the sustainability of Catholic schools.

Corporate and Foundation Relations:

Develop a case for support to share with corporations and foundations that explains the vision for Catholic schools, demonstrates the impact and benefit to Orange County employers of having a strong Catholic school system, and providing measurable data from the school's office to project the potential return on making an investment in our Catholic elementary schools

- Ensure successful adherence to grant, sponsorship and restricted giving agreements.
- Establish long range institutional giving programs for sponsorships, corporate gifts and regional sponsorships.
- Develop and implement basic guidelines for sponsorship that will preserve the integrity of the Roman Catholic Diocese School "brand" and enhance its institutional identity as preeminent Catholic academic institutions.

Special Events:

- Oversee the planning, execution, solicitation and follow up for Orange Catholic Foundation's Conference on Business & Ethics (CBE) which annually nets \$500,000 or more in support of Catholic elementary schools for outright tuition assistance granted to schools and to grow the School Tuition Assistance Endowment Fund.. Specific duties include securing corporate and table sponsorships and ticket sales; providing support to the CBE committee and strategic management of fundraising progress to goal and serving as a representative leadership team in partnerships involving event chairs and planning volunteers. An event planning firm hired by the foundation assists with the hotel contract, speaker arrangements and other logistics.
- In conjunction with the President and Executive Director and Vice President of Philanthropy of OCF, Superintendent of Schools, and Diocese staff as appropriate, develop a comprehensive, strategic plan for all annual special events that include clear strategy, follow up plans and return on investment.
- Develop new annual special events that boost institutional and individual fundraising efforts and engage diverse audiences.

Development Strategies:

- Regularly assess current funding streams and fundraising efforts, including individual and foundation giving opportunities; provide leadership to ensure initiatives are supported and make revisions to strategies where appropriate.
- In collaboration with the president and executive director of OCF, review and expand the fundraising plan for Diocesan schools; setting objectives for school fundraising; assigning metrics to development staff and collaborating with them to guide the organization in achieving its fundraising goals.
- Collaborate with other members of OCF to define and continually upgrade a systematic and donor-centric fundraising plan, segmented by type (individual, corporate, foundation), level (subscription levels, various major gift levels, planned giving), and restricted for specific purposes, including education initiatives, programs and endowment).
- Collaborate with OCF staff to establish clear standards for stewardship, donor recognition, and sponsorship and gift acceptance policies with emphasis on branding guidelines, naming and other recognition opportunities.
- Assist with short and long-range strategic planning for the Diocese of Orange and the Orange Catholic Foundation including preparation of annual operating plans and budgets which incorporate fundraising metrics and projections and strategic analysis of growth opportunities.
- Learn about staff and board leaders that are (or can become) actively involved in fundraising and refine the roles of each; develop a strong relationship with Diocesan executive leadership, OCF Board members, senior staff of the foundation, and other staff in the Orange Catholic Foundation's development program.
- Advance a unified view of donors and potential donors that incorporates information on giving habits for all Diocesan constituents, and share this view with other members of the leadership team.
- Strengthen the stewardship and donor recognition program for individual donors, with the objective of establishing life-long, planned giving and even intergenerational relationships between donors, their families and the Diocesan schools.
- Work in collaboration with the OCF donor services and gift processing team to review current processes and systems that support fundraising initiatives and donor recognition for the schools; ensure that information systems are scaled to meet new fundraising initiatives planned for schools using the OCF's Raiser's Edge and NXT fundraising data management system.
- Lead the development of collateral materials that relay the Catholic schools mission and goals to donors and individual prospects in an impactful way that is consistent with the diocesan branding campaign for schools. Ensure that these materials are segmented and distributed in a targeted, regular, timely and consistent fashion.

Experience:

Candidates should have the following type of experience and qualifications:

- Bachelor's Degree; Master's Degree preferred;
- Minimum of 5-8 years' experience in fund development with hands-on experience successfully establishing and growing long-term relationships with donors.
- Demonstrated management skills in motivating, directing and managing staff and consultants, and in coordinating and supporting the fundraising activities of others; particular facilitation in mentoring others, encouraging the best efforts of each member of the development team, and in modeling active solicitation is important.
- Significant nonprofit fundraising experience with a sizable institution that includes event, major gifts and endowment elements; experience soliciting significant gifts from individuals, foundations, and corporations.
- A record of personal success in raising money through major gifts from individuals, businesses, foundations, and corporations; broad-based knowledge of various development activities including: direct mail, proposal and grant development, planned giving, event planning and management, direct solicitations, leveraging fundraising databases and support systems for donor segmentation, research and volunteer management.
- Ability to navigate a complex fundraising environment with nuanced strategies and initiatives, while building an effective group of volunteer fundraisers through local school development and annual fund committee activity, and gaining respect of community and business leaders and the advisory committee.
- A broad knowledge of brand marketing, advertising and public relations with specific experience in structuring corporate sponsorships; demonstrated success with establishing financial stewardship and donor recognition programs that sustain long-term relationships.
- A track record as an exceptional communicator, in writing as well as verbally; adept at writing proposals, solicitation letters, donor correspondence, and other materials.
- Experience working with a multi-cultural donor base and ability to research and identify and build relationships with potential donors and parishioners from the local Hispanic and Asian communities.
- Experience using Microsoft Office computer applications, including word processing, spreadsheet software and data base applications and fund development software (past experience with Blackbaud Raiser's Edge & NXT is highly desired)

Personal Characteristics:

The successful candidate should be

- A mission-driven individual with a commitment to the mission of the Orange Catholic Foundation, the Diocese of Orange; a strong interest in raising support for and Catholic schools within the diverse communities of Orange County.
- A devout, practicing Catholic who is familiar with the Church's structure, functions and ministries..
- Reflect official Catholic teachings and values in his/her personal and professional life by an expressed commitment and witness to the Gospel as well as respect for Catholic tradition through participation in community worship, willingness to perform Christian service and to work for Christian justice.
- A good listener and strategist; comfortable receiving input from many sources, and able to analyze and formulate disparate information into a sound, well-organized plan.
- Determined yet respectful of other's concerns; someone with the flexibility and creativity needed to find alternative ways to reach funding objectives when barriers arise; a skilled negotiator who does not drive him/her selves or others into a corner.
- A charismatic communicator, able to build enthusiasm for our Catholic schools programs, and for innovative approaches that advance the reputation of our Catholic Schools in Orange County; exceptional verbal and written communication skills.
- A proven leader with a high energy level; a "doer" with willingness to work hands-on in developing and executing a variety of development and advancement activities.
- Availability and willingness to work early mornings, evenings and weekends attending foundation and diocesan events.
- A bilingual candidate with proficiency in Spanish or Vietnamese would be desirable.