



DIOCESE OF HELENA

Job Title: Director, Stewardship Services
Department: Development Department
Reports To: Director, Chancery Services
FLSA Status: Exempt

Prepared By: Cassie Hall, HR Director
Prepared Date: July 2024
Approved By: Jim Carney, Chancery Services Director
Approved Date: July 2024

Purpose: Responsible for coordination of the Annual Catholic Appeal and other diocesan stewardship appeals, the Bishop's Gala and donor appreciation events, preparation of grant applications for parishes and ministries, assisting in stewardship campaigns and providing stewardship education for parishes of the Diocese.

Essential Duties & Responsibilities:

- Plan, organize, direct, and follow up Diocese of Helena Annual Catholic Appeal (ACA).
- Work with the Communications team in preparing fund-raising brochures, audio, video materials, letters, surveys, progress reports, parish articles, and press releases for the ACA.
- Responsible for oversight of tracking pledges and funds from contributors, processing of monthly pledge reminders, and annual preparation of tax notices.
- Adapt and maintain online giving for all funds through Diocesan database; work with Data Software Systems Manager to maintain accuracy and integrity of donor data.
- Prepare thank you letters to donors from the Bishop of the Diocese of Helena.
- Record expenses incurred and contributions received.
- Work with Financial Services team to create check requests, balance fund accounts, and process grant payments.
- Organize temporary staff and/or volunteers for initial ACA mail processing (gifts and pledges received), filing and monthly statement mailing.
- Prepare grant applications and follow-up to support on-going ministries and other programs and/or projects to be determined annually. Maintain good relationship with granting foundation organizations.
- Work with a committee to plan the events that constitute the Bishop's Gala.
- Coordinate stewardship training programs for parishes within the Diocese. Provide stewardship best practices training and provide materials to support parish-level appeals.

Leader Competencies:

Budgets/Cost Control

Plans for and uses resources efficiently, always looks for ways to reduce costs, creates accurate and realistic budgets, tracks and adjusts budgets, contributes to budget planning.

Communication

Communicates well both verbally and in writing, creates accurate and punctual reports, delivers presentations, shares information and ideas with others, has good listening skills.

Decision Making/Judgment

Recognizes problems and responds, systematically gathers information, sorts through complex issues, seeks input from others, addresses root cause of issues, makes timely decisions, can make difficult decisions, uses consensus when possible, communicates decisions to others.

Hiring

Defines position requirements and necessary skills, recruits large applicant pool, prepares for and conducts good interviews, values both experience and potential, selects appropriate candidates, builds teams with

complementary skills, promotes diversity in hiring.

Managing for Results

Sets challenging and productive goals for team, keeps team accountable for actions, provides leadership and motivation, provides resources and support, uses checkpoints and data to track progress, sets up systems and processes to measure results.

Managing Performance

Applies clear/consistent performance standards, handles performance problems decisively and objectively, is direct but tactful, provides guidance and assistance to improve performance.

Planning

Develops realistic plans, sets goals, aligns plans with diocesan goals, plans for and manages resources, creates contingency plans, coordinates/cooperates with others.

Team Leadership

Anticipates and resolves conflicts, turns team diversity into an advantage, uses unique team talents, defines processes and goals, works for consensus.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

Minimum Requirements:

- Bachelor's degree or equivalent education/experience in fund raising activities.
- Must be a practicing Roman Catholic and willing to serve others in support of fulfilling the mission of the Diocese of Helena. Because of the nature of the Roman Catholic Diocese of Helena, it is required that the Director be fully supportive of the magisterium of the Roman Catholic Church.
- Must be willing to travel on occasion. Will be expected to be available on some weekends and evenings as necessary to meet the demands of the position.
- Is self-initiating and possesses good administrative, planning and organizational skills, capable of managing multiple operations and activities at the same time.
- Is able to work effectively and responsibly with Roman Catholic Ecclesial systems; and cooperatively and comfortably with diocesan employees, priests, deacons, religious and lay people in the Diocese of Helena.
- Possesses good public relations skills and is able to communicate effectively, orally and in writing, with a variety of personalities in a positive and professional manner, especially in education or instructional presentations. Possess motivation and persuasion techniques and communication skills especially through phone and in-person contact.
- Understands the guiding principles associated with stewardship under the Roman Catholic Church.
- Must complete *VIRTUS Protecting God's Children Training* and ongoing monthly bulletins

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand, walk, sit, talk and hear. The employee must occasionally lift and/or move up to 50 pounds.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

This position functions in an office environment with a controlled atmosphere building. The noise level in the work environment is usually moderate.

The above statements are intended to describe the general nature of the work being performed by employees in this position. They are not intended to be an exhaustive list of all duties, responsibilities, and qualifications. The Diocese of Helena reserves the right to amend and change responsibilities to meet business and organizational needs as necessary.

I am able to perform the essential functions of this position with/without accommodations.

Employee Signature: _____ Date: _____