

Position Profile

*On behalf of our client, Catholic Community Foundation of
Minnesota*

*CohenTaylor Executive Search Services
is conducting a retained executive search for its*

Vice President of Development and Donor Engagement



**Catholic Community
FOUNDATION
OF MINNESOTA**

Catholic Community Foundation of Minnesota

Fast Facts

- **Location:** Saint Paul
- **Service Area:** State of Minnesota with primary focus on the Twin Cities of Saint Paul and Minneapolis
- 14 staff members with 5 direct reports
- **For the fiscal quarter ending December 31, 2017:**
 - \$350 Million in assets
 - \$13.6 Million grants distributed
 - 1,100 Total Funds
 - \$107 Million Perpetual Assets
 - \$140 Million Granted Since Inception
- The Catholic Community Foundation is guided by a board of directors drawn from the ranks of Fortune 500 companies, major financial institutions, Catholic Universities and the Federal Reserve. The Board comprises 27 members.

For more information, please visit:

<https://www.ccf-mn.org/>



Mission:

Our mission is to financially support the spiritual, educational and social needs of the Catholic community.

We fulfill this mission by:

Helping donors achieve their charitable and financial goals.

Helping parishes, schools and Catholic organizations meet their long-term financial needs.

Performing sophisticated financial transactions to raise funds for charitable purposes.

Distributing earnings according to donor intent and community priorities.

Seeking endowment funds to sustain our mission.

“We are not Catholic Charities. We don’t house and feed people. We provide funding in perpetuity for those who do.”

– Anne Cullen Miller, President



The Organization

A community foundation is a public charity established to serve specific charitable interests for a designated purpose or in a designated geographical region. The Catholic Community Foundation (CCF) of Minnesota serves the spiritual, educational and social needs of Minnesota communities.

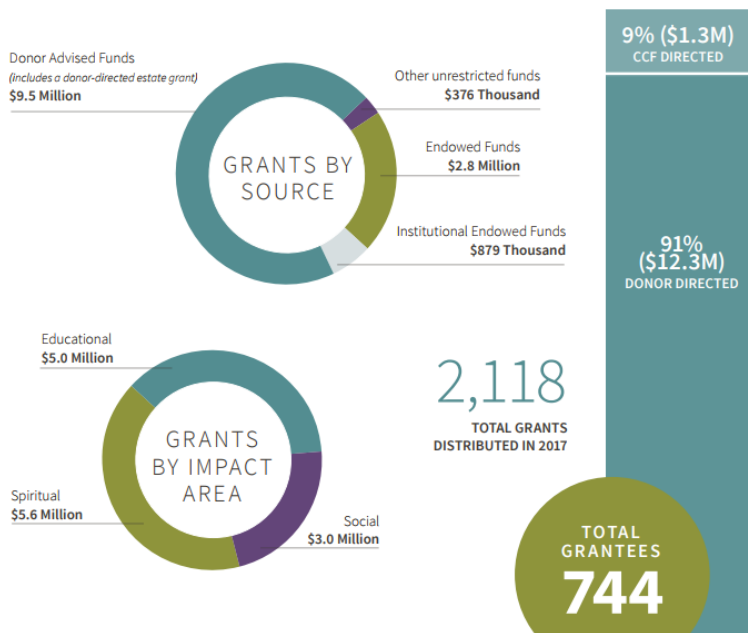
The Foundation accepts and invests assets — both individual donor and institutional assets — and participates in grant making that is advised by fund holders and their families or from institutional endowments created to serve organizations in perpetuity. While donor constituents have largely been metro-centric, institutional funds from other dioceses are part of this asset base.

Beneficiaries of grants are nonprofit organizations whose missions serve our communities across a spectrum of nonprofits—both faith based and non-sectarian. All grantees are nonprofits whose missions align with Catholic social teaching.

The Catholic Community Foundation collects, *grows* and distributes funds on behalf of its individual and institutional donors. Their gifts and unrestricted dollars of The Legacy Fund sustain many of the programs that serve our communities. As a community foundation, CCF provides targeted financial support that enables organizations to serve the spiritual, educational and social needs of the community in perpetuity.



\$13.6 Million
GRANTS DISTRIBUTED



Investment Philosophy: Efficient, Transparent, and Socially Responsible

1. With more than \$350 million in assets, CCF manages some of the most sophisticated financial transactions in the charitable realm — while investing in faith aligned manner.
2. CCF balances the need to maximize total financial return over the long term, taking into account an appropriate amount of risk, with the need to invest according to our faith.
3. CCF operates professionally and transparently. While past performance is no guarantee of future results, its 990s, audited financial statements and annual reports demonstrate expertise at achieving that balance.

Grant Recipients

Over 700 organizations receive grants from Catholic Community Foundation and its donors. Below are just a few of the many grant recipients.

American Red Cross
Banyan Community
Bridging, Inc.
CARE
Catholic Charities
Catholic Relief Services
Cristo Rey Jesuit High School – Twin Cities
Loaves and Fishes
Minneapolis Institute of Arts
Minnesota Children’s Museum
NET Ministries
Relevant Radio
Sharing and Caring Hands
Saint Paul Chamber Orchestra
Saint Paul’s Outreach
Saint Paul Seminary
Second Harvest Hartland
Union Gospel Mission
YMCA of the Greater Twin Cities
Hundreds of Catholic Parishes and Schools



The Role

The Vice President of Development and Donor Engagement for the Catholic Community Foundation (CCF) is an executive-level role and manages a team of development and marketing professionals responsible for: cultivating and stewarding relationships with existing individual donors and institutional partners, cultivating relationships with prospective donors and their professional advisors to establish new funds, and communicating and marketing the vision and value proposition of CCF to the wider community.

The Vice President of Development and Donor Engagement is part of a senior leadership team internally, serves as liaison to the Development and Marketing Committee of the Board of Directors, assists the President in staffing other Board committees and ensures that departmental/staff objectives and goals align with the organizational strategic plan. This role is also responsible for stewarding a portfolio of existing CCF donor relationships while building relationships with new donor prospects to create and build new funds.

Reporting and Management

This position reports to the President of the Foundation and has responsibility for team leadership of positions that include:

- Director of Partner Relations
- Director of Strategic Communications
- Gift Planning/Development Officer
- Development Coordinator/Office Manager
- Database Analyst

Major Position Responsibilities

- 30% - Strategic Initiative, Internal, and Board Committee Leadership
- 25% - Team Management for Development and Marketing Staff
- 25% - Cultivation of New Funds and Relationships
- 20% - Portfolio Stewardship

Strategic Initiatives, Internal and Board Committee Leadership

- Create and direct execution on action plans — individual and team — to accomplish strategic initiatives, including Professional Advisor Outreach, Next Generation Donor Outreach, research and cultivation of Private Family Foundations to facilitate potential fund conversions, Legacy Fund Development, and stewardship of existing constituencies.
- Serve as staff liaison for the Development and Marketing committee of the Board of Directors. Create committee work plans annually, set meeting agendas, communicate with members to leverage guidance and support.
- Provide assistance to President in stewarding a portfolio of donors and managing donor prospects.
- Serve in leadership/project manager role for internal projects as appropriate. Provide development/external relations perspective to all internal initiatives and projects.

Team Management for Development and Marketing Staff

- Provide team leadership, establishing a collaborative culture and facilitating a cohesive, high functioning team.
- Create strategies and action plans for each team member to align with strategic organizational goals.
- Set individual team goals and objectives, monitor and coach team members to achieve those goals.
- Meet regularly with each team member, assisting with completion of tasks as needed and helping prioritize projects and activities.
- Oversee all external messaging and communication activities. Develop and implement strategic marketing and communication plans including advertising, print communication, web presence, social media, and external communication pieces.
- Oversee database management and prospect research efforts to ensure these tools provide critical support to development efforts.
- Oversee and provide guidance for all CCF events, from planning through execution.

Cultivation of New Funds and Relationships

- Manage new prospect relationship from first point of contact with CCF through execution on a new gift.
- Conduct discovery meetings, respond to questions and inquiries, research gift possibilities as appropriate, and provide advice and guidance to prospects on the best gift plan for their needs.
- Manage internal communications and processes associated with new gift establishment, ensuring that all departments have needed information, including finance, investments, administration, and database management.

- Manage processes for gift transfer, including gifts of cash, stock, mutual funds, land, property, and other appreciated assets. Advise donors — in conjunction with their professional advisors—on recommended methods for transfer to ensure favorable tax treatment.
- Record relationship information and record activities with prospects in CCF’s CRM database.

Portfolio Stewardship

- Manage a defined portfolio of individual and institutional relationships appropriate for Vice President of Development and Donor Engagement stewardship. Actively reach out to this portfolio, with a goal to offer an annual meeting to each portfolio constituency.
- Continue discovery process with portfolio members, ensure their needs are met by CCF, and initiate conversations on how CCF may further serve their philanthropy.
- Cultivate referrals from portfolio, including other donor prospects and professional advisor and center of influence contacts.
- Work with team to respond to portfolio members needs as they arise.

The Ideal Candidate

- 10+ years of experience with proven track record in fund-raising, major gift solicitation, development/gift planning, and/or financial services sales required
- Knowledge of the “art and science” of best practices in development including portfolio management, prospect identification and qualification, database management, and relationship “moves management”.
- Ability to be authentic in relationships across an organization aligned around specifically defined values.
- Experience collaborating closely with a marketing department to advance organizational objectives, and objectives related to asset development.
- Experience managing/inspiring a team of professionals.
- Excellent communication skills (including writing and public speaking) and ability to articulate complex subjects.
- Ability to build relationships with wide variety of people including diversity of age and financial means.
- Other preferences:
 - Bachelor’s degree required; master’s, law or business administration degree preferred.
 - Familiarity with local Catholic community and passion for mission of the Catholic Church is beneficial.
 - Knowledge of charitable gift planning
 - Knowledge of/experience around investment management
 - Strategic marketing experience

For more information or to send your credentials, please email info@cohentaylor.com

All inquiries will remain confidential.