



LEADERSHIP
ROUNDTABLE
Service. Excellence. Church Management.

Partner, Institutional Advancement

Chief Development Officer

Organizational Overview

Leadership Roundtable is a responsive and innovative partner to Catholic dioceses and other Catholic institutions, helping to build effective strategies for deep and lasting change in the management and leadership of operations. The organization provides custom consultation to implement comprehensive managerial best practices, while also supporting the development of current and future leaders.

Since its founding in 2005, this 501(c)(3) nonprofit organization has emerged as the preeminent institution supporting Catholic leaders in the temporal affairs of the Church and its pastoral mission. By bringing together leaders from the worlds of business, finance, academia, philanthropy, nonprofit organizations, and the Church, Leadership Roundtable serves as a nexus for innovation and managerial excellence. Ultimately, Leadership Roundtable's goal is to help these institutions better serve Catholics and the myriad of Catholic-based services and charities.

This is an exciting time to be joining Leadership Roundtable. As a recognized thought leader, capacity builder, powerful convener and trusted counsel to Catholic leaders, Leadership Roundtable is experiencing an unprecedented demand for services that is prompting a significant staff and program expansion. As such, Leadership Roundtable is looking for a new Partner to draw upon its strong fundraising history, engaged Board of Directors, admired brand, and powerful mission to help take the organization to the next level of success.

Leadership Roundtable Mission

Leadership Roundtable promotes best practices and accountability in the management, finances, communications and human resources development of the Catholic Church in the U.S., including greater incorporation of the expertise of the laity.

Role Summary

In response to an accelerated surge in momentum for its services as well as requests by the most senior Catholic Church leaders that it play an expanded national leadership role, Leadership Roundtable has embarked on a new Strategic Direction. Foundational to this plan is a new organizational model led by a collaborative operating management committee of four peer, functional Partners and a Managing Partner. In this new structure, the former role of Chief Development Officer has been re-envisioned as **Partner, Institutional Advancement**.

To model the changes Leadership Roundtable is advocating for the Church, the Partners achieve accountability, transparency and co-responsibility through a combination of functional portfolios

where they collaborate routinely. As a result, the *Partner, Institutional Advancement* will benefit from support of the other Partners, while at the same time be called upon, when appropriate, to collaborate in responsibilities domiciled in other Partners' portfolios. Additionally, the *Partner, Institutional Advancement* will play an integral role in the operating committee's priority-setting and decision-making activities as well as participate in major decisions concerning staff activities.

Reporting to the Managing Partner, the *Partner, Institutional Advancement* will formulate and execute a comprehensive development strategy for Leadership Roundtable. S/he will work closely with the Partners, Executive Committee, Board, Development Committee, and others as necessary, to create development plans and goals focused on the strategic objectives of the organization. The *Partner, Institutional Advancement* will have a clear focus on, and passion for, finding and building relationships, as well as cultivating and securing major gifts, grants, and event sponsorships. This individual must possess the ability to strengthen relationships with current and future Leadership Roundtable donors, individuals as well as foundations, to advance the organization's mission.

The *Partner, Institutional Advancement* will work together with the Communications and Marketing team to increase philanthropic resources, high-impact partnerships, brand awareness, and powerful connections with both Leadership Roundtable's existing stakeholders and new sources of support. S/he will compellingly articulate and leverage Leadership Roundtable's past contributions as well as future initiatives with respect to the Catholic Church in the U.S., including participating, when appropriate, in selected public conferences and engagements on behalf of the organization.

Leadership Roundtable is seeking a proven leader, manager, mentor, and collaborative colleague who is comfortable leading complex fundraising initiatives and stewarding a portfolio of major donors. This person will possess a proven track record of achieving six- and seven-figure gifts and have an astute understanding of what is required to bring about growth in non-earned revenue across several areas and among multiple constituencies. S/he will introduce the organization to modern, innovative techniques of identifying, cultivating and sustaining donors while modeling accountability, transparency and co-responsibility in all development activities.

Specific Responsibilities Include

- In consultation with the Partners, set realistic annual fundraising goals for the organization to ensure sufficient non-earned revenue to maintain a sound fiscal foundation as well as fund current operations and future initiatives.
- Prepare and implement a comprehensive annual Development Plan, to be submitted to the Board of Directors, designed to meet the stated fundraising goals while remaining consistent with Leadership Roundtable's vision, mission, guiding principles and strategic directions.
- As Partner, serve on Leadership Roundtable's operating committee, contributing to the overarching organizational strategy, priority-setting and decision-making. Inform Leadership Roundtable's efforts to develop high-impact services, programming, engagement, and communication.
- In collaboration with the Partners and the Board Executive Committee, develop and refine all documents associated with donor outreach as part of an integrated donor

communications plan supporting Leadership Roundtable's brand; share input on print and digital communications, including the annual report, collateral marketing materials, video production, electronic communications, websites and social media.

- Develop strategies and execute plans that will drive pledge initiatives, build the Philanthropic Partnership program, and increase the number of donors and size of gifts.
- Create and implement appeal strategies to include multi-channel campaigns and to manage any new or existing acquisition mailings.
- Oversee the expansion of the development staff while providing supervision and mentoring for individual growth.
- Lead efforts to identify and secure foundation support for current programs and future projects through comprehensive outreach to existing and prospective funders.
- Oversee grants management including actively participating in identifying, writing and submitting grant proposals as well as the processes of tracking and reporting.
- Plan and implement regional events – virtually, if necessary – to identify and cultivate prospective donors.
- Identify and refine giving priorities among current and prospective donors, and translate those priorities into persuasive proposals and compelling opportunities for philanthropy, including aligning individuals with volunteer leadership opportunities, committees, and/or events consistent with one's interests as a means to foster engagement and eventual financial support of Leadership Roundtable.
- Provide leadership and support to members of the Board for the planning, coordination, and execution of initiatives to cultivate major and mid-level donors and meet contribution targets.
- Maintain a current and thorough understanding of relevant tax laws and estate planning strategies. Develop a plan to educate donors about planned giving opportunities and secure such support. Establish a legacy giving society.
- Serve as a key strategist and contributing coordinator of Leadership Roundtable's annual Catholic Partnership Summit.
- Formulate and submit an annual budget as well as all information necessary to complete and file internal and external reports, including our Standards for Excellence certification.

Required Qualifications and Experience

- A minimum of 10 years' experience in progressively responsible senior executive development and leadership positions, preferably within a faith-based, nonprofit organization(s) related to social outreach, organizational capacity building, or human services.
- Steeped in modern philanthropy best practices and possessing the ability to integrate development functions. Must have the breadth of skills required to devise and implement enterprise-wide communications strategies.
- Experience working directly with senior leadership and Board members as well as the

ability to effectively strategize and engage various groups and constituents.
Demonstrated ability to translate concepts into multi-stakeholder initiatives.

- Hands-on experience with six- and seven-figure gifts, including cultivation through solicitation and stewardship, as well as working with annual giving strategies; demonstrated entrepreneurial spirit in successfully securing gifts from both defined and undefined constituencies.
- Demonstrated business acumen, including experience creating and managing a budget; ability to extract and analyze data to make effective, efficient decisions about strategy and process. Skilled at goal-setting and applying and extrapolating metrics to determine efficacy and success of various initiatives.
- Experience utilizing, managing, and maintaining donor databases. Familiarity with Raiser's Edge is required.
- Passion for the mission of Leadership Roundtable with exceptional interpersonal, writing, presentation and public speaking skills to communicate cordially and persuasively while generating excitement about the mission, vision and programs.
- Commitment to and understanding of the mission and teachings of the Roman Catholic Church.
- Values-driven, emotionally intelligent, and committed to personal and professional development with a creative approach to problem solving and the sense to recognize and capitalize on emerging opportunities. A commitment to process, producing desired outcomes, and continuous improvement.
- Unimpeachable integrity, trustworthiness and discretion including compliance with the Standards for Excellence, as well as a commitment to the Association of Fundraising Professionals Code of Ethics and Donor Bill of Rights with particular regard to donor confidentiality and privacy.
- Comfortable working independently and as a member of a team. Must be a team builder who takes a non-hierarchical approach to leadership and empowers subordinates to succeed by providing necessary support and information.
- A high-energy self-starter with a sense of urgency and ability to prioritize; an appreciation for customer service with impeccable follow-through; the dexterity to seamlessly adapt to changing circumstances in a strategically-managed, action-oriented, and fast-paced environment.
- Ability and willingness to travel frequently once restrictions with respect to the Covid-19 pandemic are lifted.
- Available during Eastern Standard Time business hours as well as for occasional evening and weekend events.
- Familiarity with G-Suite Business and Adobe Creative Suite is helpful.
- Bachelor's degree required, Master's degree preferred; an advanced degree or professional fundraising certification (CFRE, ACFRE or CAP) is also preferred.

Compensation

- Competitive non-profit salary
- SEP-IRA: 10% of annual salary, paid quarterly
- Benefits: full health, dental and vision insurance coverage
- Paid vacation, holidays and sick days as per Leadership Roundtable policy

Equal Opportunity Employer

Leadership Roundtable is committed to creating a diverse work environment, where talented individuals from diverse backgrounds want to come, stay and do their best work. Leadership Roundtable does not discriminate on the basis of race, sex, color, religion, age, national origin, marital status, disability, veteran status, genetic information, sexual orientation, gender identity or any other reason prohibited by law in provision of employment opportunities and benefits.

Applications and Inquiries

To apply, kindly submit a cover letter and resume to Ana@LeadershipRoundtable.org.

Company:	Leadership Roundtable
Reports to:	Managing Partner, Leadership Roundtable
Location:	Washington, D.C. or remote
Website:	leadershiproundtable.org