

Roswell United Methodist Church - Job Description

Position: Executive Director, The RUMC Foundation, Inc.

Date: July 2018

Responsible to: The Foundation's Board of Directors and the RUMC Church Business Administrator

Exempt, part-time (average of 20 hours/week), salaried position (*with the possibility of increased hours as the Foundation grows and needs change*)

General Description: Motivate, inspire, educate, and assist members in planned charitable giving by directing, coordinating, planning, and supervising the ministry of The RUMC Foundation, Inc. Focus on driving the strategic growth and development of the Foundation towards its goals through execution of the Foundation's strategic plan which currently has five elements:

1. ***Focus on Congregational Education***
2. ***Create Regular Opportunities to Give***
3. ***Regularly Ask for Gifts***
4. ***Maintain Connections with Donors***
5. ***Evaluate Operational Efficiency***

Specific Job Responsibilities: Each of the above strategic plan elements encompass specific job requirements.

1. Focus on Congregational Education

- a. Plan for and execute effective Foundation moments in worship that share the joy and stories behind new endowments and also educate the congregation about endowments and how they work.
- b. Represent the Foundation by teaching adult Sunday School classes and speaking at church functions.
- c. Regularly ask for an audience with key church groups.
- d. Be a "presence" on behalf of the Foundation to remind members that there is a Foundation and that charitable, planned giving is a vital part of Christian stewardship.
- e. Assist members/donors in finding professionals to implement their wishes for charitable planned giving.
- f. Plan and execute all events related to the Foundation that highlight the Foundation's purpose and help to secure more congregational participation. This could include things such as appreciation events for Foundation donors, planned giving information sessions or wills seminars that are open to all church members and the community, etc.
- g. Produce endowment newsletters that highlight the work of the Foundation.
- h. Work with the church's communications and marketing staff to effectively utilize all available communication tools (such as bulletins, eblasts, the Foundation's website, and social media) when able to promote the Foundation and endowments.
- i. Create and update marketing pieces such as Foundation brochures as needed to support the education of all RUMC members.
- j. Review and report on the Foundation's financial position, both from an operating expense and portfolio performance perspective, as well as its contributions to the ministry of the church and its mission partners, to lay, pastoral, and district-level leadership.

2. Create Regular Opportunities to Give

- a. Meet with members and/or their families to establish planned charitable gifts.
- b. Look for ways to create new opportunities to give where appropriate and maintain all existing modes of donation such as via the Foundation's website, golf event, direct donations, etc.
- c. Ensure that any memorial and tribute gifts designated for the Foundation are properly recorded and acknowledged. Work with family members to determine the best way to use memorial funds to honor their loved one and then take all steps needed to execute the family's wishes in this regard.

3. Regularly Ask for Gifts

- a. With support from the church's clergy where needed, identify church members likely to consider planned gifts and discuss options with these members.
- b. Maintain a current listing of possible donors and a schedule of meetings to sit with members, answer any questions, and to ask for planned gifts.
- c. Enable Sunday School classes or other groups to pool their resources to create new endowments when needed.

4. Maintain Connections with Donors

- a. Annually provide a report of each endowment to key family members, contributors, and /or other stakeholders of the endowment.
- b. Ensure timely, accurate, and meaningful thank you letters are written for all donations that can be used for IRS tax purposes.
- c. Ensure contribution statements to all donors are accurate and available on a regular basis.
- d. Manage the member listing, publication of, and special events for The 1836 Registry of The RUMC Foundation, Inc. (*Named for the year our church was founded, The 1836 Registry recognizes and honors those who have chosen to make a legacy gift to the church through The RUMC Foundation, Inc. by establishing new, or contributing to the growth of existing, endowments either during their lifetime or through their estate plans.*)

5. Evaluate Operational Efficiency

- a. Review and update the Foundation's strategic plan as needed and ensure Board approval of the plan as well as Board awareness of execution against the plan.
- b. Process all paperwork for new endowments including endowment agreements and investment management agreements. Ensure that endowment designations are appropriate and will be able to be honored long-term.
- c. Work with the Foundation's Treasurer and the Foundation Board of Directors in planning, managing assets, calculating and distributing endowment fund proceeds, and distributing non-endowment assets.
- d. Facilitate and record all grant voting by the Board and maintain proper records of expenses related to approved grants.
- e. Prepare requests for distribution of grants and then track approved distributions in direct coordination with the Foundation's Treasurer.
- f. Assist ministry leaders and mission partner representatives with the grant submission process where needed.
- g. Maintain the Foundation office and records of gifts, Friends of Foundation files, financial records, policies, etc.
- h. Plan and organize the quarterly Board meetings in consultation with the Chair of the Foundation's Board and the Foundation's Treasurer.
- i. Manage the Director of the Malone Dodson Golf Tournament to ensure the success of this annual October event.
- j. Serve as an active member of the Golf Tournament Committee.
- k. Ensure that all golf tournament donors and sponsors receive appropriate gratitude including written thank you letters that are suitable for use for tax-deduction purposes.
- l. Evaluate alternative sources of operational funds as needed. (Currently, the annual golf tournament funds the Director of the Foundation and the Tournament Director positions as well as all other annual operating costs associated with the Foundation.)

This is not necessarily an exhaustive list of all duties, performance standards or requirements, efforts, skills, or working conditions associated with this job. It is, however, intended to be an accurate reflection of the current job responsibilities. Please specify job and email your resume to hr@rumc.com

