

ASPEN LEADERSHIP GROUP

EXECUTIVE DIRECTOR
CATHOLIC FOUNDATION OF SOUTHERN MINNESOTA
WINONA, MINNESOTA



Aspen Leadership Group is proud to partner with the Catholic Foundation of Southern Minnesota in the search for an Executive Director.

The Executive Director will be a proven leader with an ability to lead Catholic Foundation of Southern Minnesota towards the fulfillment of its mission of support and service. The Executive Director will be responsible for all aspects of direction of the organization including the creation of a strategic vision for growth that will strengthen Catholic ministry diocesan wide. The Executive Director will be a motivated thinker who thrives working with an engaged Board of Directors, talented staff, and donors across the diocese. The Executive Director will apply their proven business mindset to create and meet growth and financial goals, while maintaining a strong Catholic identity for the organization.

The Catholic Foundation of Southern Minnesota is a nonprofit foundation organized and operated exclusively for religious, charitable, and educational purposes within the geographical boundaries of the Diocese of Winona-Rochester located in southern Minnesota. Since its founding in 1991, the Foundation has faithfully managed and distributed contributions according to donors' wishes in areas of greatest need in the wider community. The Foundation stands as a Center for Catholic Philanthropy across southern Minnesota and beyond in service of Catholic Responsible Investing and sophisticated planned giving that celebrates its Catholic identity. Over the life of the Foundation, nearly \$80 million has been stewarded back into the southern Minnesota community as a direct result of the generosity of Catholics.

The Catholic Foundation of Southern Minnesota supports parishes, schools, and ministries with the necessary resources to be vibrant centers of faith and service in southern Minnesota and to assist faithful Catholics in fulfilling their stewardship call. The Foundation promotes compassionate charitable giving and stewardship by seeking endowment funds that support its mission; helping donors achieve their charitable and financial goals; helping parishes, schools, and Catholic organizations meet their long-term financial needs; providing responsible and effective financial management; and distributing earnings according to donor intent.

The Foundation is a public charity established to serve Catholic charitable interests throughout southern Minnesota. Donors have the option of creating funds in support of their interests with respect to the foundation's purpose. Currently, the Catholic Foundation of Southern Minnesota stewards 70 different funds each in alignment with Catholic means and ends. Donors may designate which organizations will benefit through a restricted gift, or they may make an unrestricted gift in support of the overall mission of the Foundation. Since all funds are invested, the funds continue to grow so that over time more and more charitable causes will benefit from these gifts.

There are five main areas of support through the Catholic Foundation of Southern Minnesota. *You Are the Light of the World*, the annual Catholic Ministries Appeal 2024 (CMA), is a primary source of funding to help sustain and expand ministries in the 93 parishes, 23 schools, Catholic Charities, programs, and departments of the diocesan church. The Catholic Church serves the needs of many people across southern Minnesota and beyond. While some of these services are offered at the parish level, it is often more effective when many join together in ministry and service of the people of the diocese. Each diocesan ministry exists to support the work of local parishes.

The *Seminarian Education Fund* supports the education of future priests. After many years of declining numbers of priestly vocations, there is now an increase in the number of men who are exploring and answering the call to serve as priests. This is a major financial challenge because of the cost to provide a college education for seminarians. The cost of college education can reach well into the hundreds of thousands of dollars. Since priests receive only a modest salary after ordination, it is imperative that the diocese be able to offer financial assistance to educate these future priests.

The *Hearts of Fire Appeal—IHM Seminary* is another way to support seminarians. In 1948, Bishop Leo Binz, then Coadjutor Bishop of the Diocese of Winona, had the foresight to establish Immaculate Heart of Mary Seminary as a place for men to discern and prepare for a life of priestly service. Seven decades later, the seminary continues to carry out this vital mission of forming men to follow the call of Christ.

Donors to the Catholic Foundation of Southern Minnesota can also choose to support the *Ann Loomis Fund*. This fund provides hope by assisting the most vulnerable children to obtain an education and bring the most basic necessities of shelter, food, clothing, and medical care to the elderly and widowed poor.

The *Foundation in Christ Campaign* is a project to renovate and repair the Holy Family Catholic Church building in Kasson, Minnesota. The church was built in 1995, and due to the construction method, it now requires the replacement of all windows and exterior finish materials, as well as additional maintenance projects.

The Catholic Foundation of Southern Minnesota currently manages assets in excess of \$34 million.

REPORTING RELATIONSHIPS

The Executive Director will report to the Board of Directors, chaired by Dr. Michael E. Speltz. The Executive Director will oversee the Controller, the Database Manager, and the Graphic Arts Support staff.

FROM THE CHAIR, BOARD OF DIRECTORS

Thank you sincerely for your interest in serving as the Executive Director for the Catholic Foundation of Southern Minnesota. We are seeking a partner with a high degree of collaborative spirit and ingenuity that carefully aligns with our mission to support Catholic parishes, schools, and ministries by stewarding resources that allows these entities to grow and thrive and contribute to the common good of our world.

The role of philanthropy is a fundamental element to the success of the Catholic church and schools that is fostered by a spirit of helping individuals and organizations achieve their charitable and financial goals underscored with a deep sense of making lasting and meaningful change. Success will be attained by reaching beyond the status quo and demonstrating the value that the Catholic Foundation can bring to provide support and streamline efforts that often seem insurmountable. Equally critical is the value of building relationships that are centered on trust, transparency, and a keen desire to deliver and exceed expectations.

The work of the Catholic Foundation has resulted in the distribution of more than \$80 million back to communities and individuals to instill continued learning, spiritual development, and support the long-term growth of churches, schools, and various ministries. It is clearly a good feeling to be part of something so important that provides a beacon of hope in facing the many societal changes that we face in our world. As we plan our future, the Executive Director serves as a pivotal player in reaching out to local parishes to build relationships as well as developing rapport with potential donors; it is this Executive Director that will provide strong strategic planning ability, a high level of self-motivation, and a strong sense of furthering the mission of the Catholic Foundation of Southern Minnesota. Equally important is the ability to champion a vast array of fundraising skills, innovative solutions, and marketplace experiences.

Thank you for your consideration and we look forward to your application.

—Dr. Michael E. Speltz, Board Chair and Corporate Treasurer for the Academy of Our Lady of Lourdes

PRIMARY RESPONSIBILITIES

The Executive Director will

- collaborate with the Board of Directors, Pastors, Parish Administrators and Diocese of Winona-Rochester staff, especially the Director of Development;
- establish, create, review, coordinate, and implement endowment opportunities throughout the diocese;
- coordinate the planning and execution of the Catholic Ministries Appeal and additional diocesan appeals and campaigns;
- coordinate with the diocesan Director of Development in the execution of campaigns initiated by institutions within the Diocese of Winona-Rochester;
- recruit and work closely with the Board of Directors to achieve revenue and investment objectives and review those objectives on a regular basis;
- develop and maintain a database of all donations and donors and maintain confidentiality of donor information;
- oversee the production of acknowledgment letters and year-end tax letters for donations made to the Foundation;
- oversee the management of funds and the reporting of regular investment statements to stake holders;
- make oral and written presentations that communicate the goals, objectives, and values of the Foundation;
- provide stewardship, investment, development, event planning, and communication services to contracted clients such as the IHM Seminary;
- identify new opportunities for partnership with Catholic entities and individuals in the diocese for investment management and legacy planning;
- identify and cultivate major gift donors and sources of funding in the creation of endowments to benefit Catholic ministries in the diocese as well as donor advised funds;
- work closely with the Diocese Development Director under the advisement of the Board of Directors to avoid confusion on roles and responsibilities in relation to major projects, major gift donors, and major sources of funding;
- serve as a Curia member of the Diocese and serve on committees; and
- identify and maintain effective working relationships with related professionals such as attorneys, accountants, estate planners, trust officers, financial advisors, and bankers.

ABOUT THE BOARD OF DIRECTORS

The Foundation is governed by an engaged ten-member Board of Directors, which works closely in a collaborative and transparent environment that allows for the sharing of time, talent, resources, and assignments. All Board members serve in a voluntary capacity and this group is comprised of a diverse blend of individuals that are highly committed to the mission of the Catholic Foundation. Their input and involvement have been highly interactive to ensure wise decision making to ensure strategic growth and development. Individuals serving on this Board include: Dr. Michael E. Speltz, Board Chair and Corporate Treasurer for the Academy of Our Lady of Lourdes; Len Huegel; Jeff Snider, Elementary School Principal; Dr. Dale Loeffler, Retired Physician; Katie Glaser, Chief Technology Officer, Converge One; Mark Greenwood, Retired Banker, Compeer Financial; Bishop Robert Barron; Reverend William Thompson, Vicar General; Andrew Brannon, Chief Financial Officer for the Diocese of Winona-Rochester; and Fr. Edward McGrath, Pastor, Chatfield Minnesota Parish.

PREFERRED COMPETENCIES AND QUALIFICATIONS

The Catholic Foundation of Southern Minnesota seeks an Executive Director with

- a commitment to the mission of the Catholic Foundation of Southern Minnesota—to support parishes, schools, and ministries with the necessary resources to be vibrant centers of faith and service in southern Minnesota and to assist faithful Catholics in fulfilling their stewardship call;
- an ability to articulate the theology of the Catholic Church regarding stewardship and its link to the baptismal call to discipleship as well as a belief in, and understanding of, the teachings of the Catholic faith;
- excellent interpersonal and communication skills;
- an ability to produce creative and compelling marketing programs;
- an ability to work collaboratively with colleagues.
- an ability to respond to and change direction rapidly;
- experience working in the areas of finance, investments, estate planning, and grant writing;
- an ability to lead, supervise, and motivate staff;
- strong knowledge of the various fundraising tactics and regulatory guidelines for nonprofit management; and
- fluency with Microsoft, Foundant, and Google applications.

A bachelor's degree or an equivalent combination of education and experience and at least five years of experience in business administration, management, philanthropy, finance, or communications is preferred for this position.

SALARY AND BENEFITS

The salary range for this position is \$100,000 to \$115,000 annually. The Catholic Foundation of Southern Minnesota offers a competitive package of benefits.

LOCATION

This position is in Winona, Minnesota.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of the Catholic Foundation of Southern Minnesota as well as the responsibilities and qualifications presented in the prospectus.*** Review of applications will begin immediately and will continue until the successful candidate has been selected.

To apply for this position, visit: [Executive Director, Catholic Foundation of Southern Minnesota](#).

To nominate a candidate, please contact Steven Wallace, stevenwallace@aspenleadershipgroup.com.

All inquiries will be held in confidence.