

**Presbyterian Church (U.S.A.) Foundation
New Covenant Trust Company, N.A.**

Position: Program Associate	Department: Development
Incumbent:	Date of Description: December 2022
Reports To: Senior Ministry Relations Officers	Grade 20

Basic Commitment

This position calls for a commitment to Jesus Christ through the church, an evident love for all people of varying views and personalities, a commitment to the governance of the Presbyterian Church (U.S.A.), a responsible affirmation of personal stewardship, and a concern for the financial support of the Presbyterian Church (U.S.A.) in all its worship, mission, and witness. The position provides leadership to the Foundation for the stewardship of accumulated resources.

Position Summary

The Ministry Relations Officers (MROs) are the main relationship builders with Pastors as well as Church and Institutional leaders representing the Presbyterian Foundation and its services and support. The Program Associate will support the MROs.

- Follow up with attendees of key MRO events.
- Assist with specific MRO tasks as assigned by Senior Ministry Relations Officer (SMRO).
- Provide technical assistance to MRO team webinars and virtual learning opportunities.
- Provide project management to MRO team initiatives.
- Manage MRO team special projects.
- Support half of the MRO team administratively
- responsible for performing a variety of tasks including general correspondence, data management and reporting, prospect research, marketing and mailings, and administrative assistant functions.

Scope and Breadth of Position

This position supports and reports to the SMROs.

Budget Responsibility

Operating Budget with the oversight and approval of the SMROs.

Responsibilities

1. Travel to meetings / gatherings with MRO staff, providing support while gaining experience with donors, congregations, presbyteries, and other related institutions.
2. Organize and standardize presentations used by MROs. Work with marketing department to design and disseminate for MROs as needed.
3. Learn the many different products and services offered by the Foundation and NCTC.
4. Participate as an observer on the Special Gifts Committee, learning how gift exceptions are processed and handled at the Foundation.
5. Engage and participate on social media platforms with other Presbyterians, facilitating the identification of opportunities where the Foundation could provide assistance.
6. On behalf of the SMROs and MROs, make outgoing calls (for example, courtesy contact to Stewardship/Planned Giving Navigator enrollees, contact requests from Client Services, etc.)

7. On behalf of the SMROs and MROS, coordinate mass communication efforts of donors and churches (for example; birthday cards, invitations, announcements about upcoming programs, etc.)
8. Coordinate logistics of meetings for SMROs including location, reservations, event registration, catering, handouts, and presentation materials.
9. At the direction of the SMROs, lead presentations, return calls, troubleshoot issues, and engage churches and individuals.
10. Provide technical assistance to MRO team webinars and virtual learning opportunities.
11. Provide project management to MRO team initiatives.
12. Manage the monthly birthday card program.
13. At the request of MROs, represent the Foundation at events, council meetings, etc.
14. Manage Christmas Card program
15. Manage Online Giving accounts that have gone dormant
16. Manage Perm Fund response to verification letter follow ups
17. Input data into Raiser's Edge.
18. Furnish training and support to team members for system applications.
19. Maintain the databases of prospects and donor information, which will assist in financial research.
20. Responsible for identifying, researching, and analyzing prospects for major gift cultivation and solicitation in support of the Ministry Relations Officers using a wide variety of biographical, organizational, and financial sources, including state-of-the-art online database services, Internet websites, library and government sources, and other external repositories of public information.
21. Analyze and synthesize accumulated information to assess financial capacity, philanthropic tendencies, giving propensity, and linkages to the PC(USA).
22. Compose documents (profiles, biographies, project summaries) using style, grammar and content appropriate to specific audiences.
23. Manage office filing system.
24. Develop and format weekly, monthly, quarterly and any other reports necessary.
25. Extensive travel as required.

Performance Metrics

1. Appropriate follow up as assigned by MRO to congregations who have signed up for the Stewardship and/or Planned Giving Navigator.
2. Provide appropriate support to MRO to enhance relationships with congregations in the form of email and or phone communication as well as participating in appropriate face-to-face meetings.
3. Ensure the timely implementation of the monthly birthday card program.
4. Ensure the successful implementation of MRO team webinars and virtual learning opportunities.
5. Ensure the timely completion of MRO team initiatives.

Experience and Job Related Requirements

1. A college degree in business, finance, accounting or the humanities (or equivalent degrees for clergy) is required.
2. An active member of the Presbyterian Church (U.S.A.) with knowledge of polity, organizational structure, and mission of the Church. Ordination as a ruling or teaching elder is preferred.
3. Experience in relationship management, customer service, and customer support.
4. Experience with a fundraising database management system preferred.
5. Demonstrated computer skills in Microsoft Office and Internet.
6. General fundraising skills, including proficiency at supporting and participating in prospect management and tracking processes, and staying informed of trends in the field.
7. Proficiency with technology and the many ways to use technology to manage relationships and implement virtual learning opportunities such as webinars and workshops.
8. Ability to establish relationships of confidence, trust, and full credibility with donors and prospective donors, investors and prospective investors, together with pastors and other church leaders.

9. Excellent listening skills giving full attention to the customer/channel partner with ability to ask appropriate and adequate questions to uncover real needs/concerns.
10. Must have extraordinary interpersonal and communication skills and be able to effectively establish and maintain relationships as well as balance diverse priorities.
11. Proficient in communicating ideas and concepts via presentations before audiences of various knowledge levels.
12. Proficiency with time management disciplines such that one can work remotely and keep in good communication with the team. Ability to handle multiple cases at one time and bring each case to a successful close and implementation.
13. Ability to work independently, under supervision and in a team based and goal-oriented environment.
14. Solid project management skills including problem solving, work prioritization and meeting deadlines.
15. Ability to build relationships with new constituencies.
16. Cultural competence.
17. A self-starter who understands corporate approval systems.

Physical Requirements

- Ability to communicate orally with management, co-workers, constituents, and public both individually and in a group/team environment
- Regular use of the telephone and e-mail for communication is essential
- Sitting for extended periods is common
- Hearing and vision within normal ranges are essential for typical conversations to receive ordinary information and to prepare or inspect documents
- No heavy lifting is expected. Exertion of up to 10 lbs. of force occasionally may be required.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.

Work Environment

- Activities include extended periods of sitting and extensive work at a computer monitor and/or calculator.
- Extensive travel is required.