



Job Title: Gift Planning Officer

Position Reports to: President & CEO

FLSA (Exempt/Non-Exempt): Exempt

Position Summary

Gift Planning Officer (GPO) is responsible for identifying, cultivating, and soliciting current and deferred planned gifts from prospective donors. The GPO will assist Catholics to grow in their understanding of living their faith through stewardship – seeing all as a gift from God and responding in gratitude by generously sharing one’s gifts with others.

Duties and Responsibilities

- Develop strategies and manage ongoing relationships with up to 200 prospective donors.
- Cultivate and solicit single and multi-year current planned gifts and develop relationships that result in commitments to deferred planned gifts.
- Plan and execute current gift campaigns for various programs of the foundation.
- Serve as a liaison and planned giving resource for Catholic leaders--pastors, agency heads, archdiocesan high school presidents and development professionals at local Catholic parishes, schools, and ministries – our Planned Giving Partners.
- Track and monitor donor histories; conduct donor research; ensure appropriate outreach is designed and implemented; follow up with all prospective donors (personal visits, phone calls, letters) who have made or expressed interest in making a planned gift; ensure all donors are recognized for their contributions (correspondence, recognition events, invitations to special events).
- Conduct gift planning presentations to prospective donors and Catholic leaders.
- Work with the President to develop marketing materials. Conduct necessary research; draft and edit all materials; review and approve print design and web copy; coordinate all aspects of mailings.
- Prepare educational articles for newsletter, website, and blog.
- Adhere to regulations and policies governing donor privacy and data security.
- Work with legal counsel and fiduciary institutions in preparing documentation for planned gift donors and prospective donors.

- Serve as resource to staff and donors on charitable giving issues and tax law; advise attorneys, financial advisors, and other professionals on gift policies; attend staff meetings to discuss and consult on major gift reviews and strategy sessions.
- Analyze program results and cost effectiveness of Planned Giving Program; develop reports and materials for presentation to Board; recommend annual goals and budget projections; make recommendations for future actions.
- Attend and/or conduct Legacy Planning Seminars for prospective donor groups.
- Work occasional events held during evenings and weekends.
- Perform other duties as assigned.

Knowledge, Skills and Experience Requirements:

- Bachelor's degree required; Master's degree or Law degree desired.
- Five to ten years of directly related work experience with a successful track record in planned giving, major gifts, estate planning and/or financial planning.
- Mastery of Planned Giving concepts, including complex gift structuring methodology.
- Knowledge of Major Gift Fundraising.
- Proficient knowledge of Microsoft Excel, Word and PowerPoint; familiarity with Raisers Edge and PG Calc.
- Knowledge of and commitment to the Catholic Church. Ideally, view this work as "mission."
- Outstanding interpersonal skills – comfort and ease working with mature donors.
- Ability to think creatively and strategically.
- Ability to work collaboratively with others inside and outside the organization.
- Impeccable integrity and a positive, "can do" attitude.
- Strong organizational and time management skills.
- Excellent oral and written communication skills.
- Effective team player who demonstrates reliability, cooperates and pitches in to help, exhibits flexibility, and executes good judgment.
- Ability to manage multiple tasks and heavy workload.