



# Job Description

Diocese of Charlotte

**POSITION TITLE:** Planned Gift Officer  
**DEPARTMENT:** Development / Foundation  
**REPORTS TO:** Director of Planned Giving  
**FLSA:** EXEMPT

**POSITION SUMMARY:** Responsible for securing planned gifts to support ministries of the Diocese of Charlotte, cultivate relationships with current and new Catholic Heritage Society members, and increase endowment gifts to the Foundation Diocese of Charlotte that support the Diocese of Charlotte.

## **ESSENTIAL FUNCTIONS:**

1. Cultivate, solicit, and steward planned giving prospects and Catholic Heritage Society members to realize greater impact for the diocese, foundation, parishes, schools, and the ministries of the Diocese through face-to-face visits, phone calls, written communications, e-mails, events, and direct response tools.
2. Assists in the acquisition and growth of endowments to the Foundation of the Diocese of Charlotte.
3. Assists parishes with the implementation and growth of planned giving committees (Legacy Society), including the establishment of a parish liaison.
4. Travels to parishes to provide on-site leadership, guidance, and support.
5. Develops and monitors timely reports relative to planned gift strategies and benchmarks.
6. Track and record expected, pending, and mature planned gifts.
7. Provide assistance with Catholic Heritage Society events.

## **OTHER RESPONSIBILITIES:**

1. Performs other duties as assigned.

## **EDUCATION, EXPERIENCE AND SKILLS REQUIRED:**

Bachelor's degree and 5 years of demonstrated experience in the field of professional fund development, with 3 years specific to planned giving preferable. Community, Catholic Foundation or diocesan experience also preferred. Must be comfortable initiating conversations and interact effectively with donors, prospects, parish leaders, and all levels represented by the Church. Excellent computer skills, especially Word, Excel, Outlook, and Blackbaud Raiser's Edge/ NXT. Strong organization, follow-up skills, and attention to detail. Ability to work with confidential and sensitive materials. Ability to work independently and to take initiative and participate as an effective team member. Catholic preferred.



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**WORKING ENVIRONMENT:** Travel 60% of the time. Office hours are 9:00 a.m. – 5:00 p.m., Monday through Friday with hours varying due to travel, evening or weekend work.

**PHYSICAL DEMANDS:** *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel and talk or hear. The employee is occasionally required to stand; walk and reach with hands and arms. Must be able to maneuver within a variety of church facilities.

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Employee Signature

Date

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Supervisor Signature

Date

Effective Date: January 2020