



Archdiocese of Baltimore  
Central Services Job Description

Job Title: Senior Major and Planned Gifts Officer

Grade:

FLSA Status: Exempt

Division/Office: Advancement

Department: Advancement

Reports To: Senior Director of Philanthropy

Standard Hours: Minimum 40 Hours per week

Description

The Archdiocese of Baltimore (AOB) Advancement Team seeks a **Senior and Planned Gifts Officer**, an individual with significant major gifts, campaign, and planned giving experience, one with a tireless work ethic, commitment to mission, focus on excellence, creative thinking, and optimism. Currently, the Chief Advancement Officer is growing the Advancement Team and fundraising program. Therefore, it's an excellent time for an entrepreneurial-minded, relationship-builder to join the team as we plan and prepare for the next archdiocesan comprehensive campaign.

Additionally, as the Catholic Community Foundation (CCF) looks forward to celebrating its 25th anniversary in 2023, we recognize the opportunity to increase our efforts to identify, engage, and solicit new major donors and renew and increase their gifts from our current roster of donors. The CCF is also interested in raising awareness among our donors of the value and importance of planned giving. CCF receives a handful of planned gifts without a focused effort. With this position, CCF seeks to engage donors directly and invite them to consider including CCF in their estate planning. Finally, and importantly, all front-facing fundraisers will be assigned to specific parishes/regions with a high concentration of donors to the AOB.

**Essential Functions** • This professional will collaborate with other members of the Advancement Team to plan and execute a focused engagement strategy to increase the number of donors, and overall dollars contributed to the AOB on an annual basis, especially at the Annual Appeal for Catholic Ministries leadership giving level; encourage volunteering for various opportunities, foster attendance at events, and connect with donors and other friends based on affinity and interests

Individual Major Gifts

- In partnership with the senior leadership team, design, develop, and implement programs and activities to identify, cultivate, solicit, and steward donors at the major gift level (\$25,000 level and above), with a specific emphasis on growing the AOB's base of donors making gifts of at least \$25,000 annually; the candidate will actively participate in the identification and qualification of new major gift and leadership annual gift (\$10,000+) prospects
- Cultivate and grow a visible presence within the broader AOB community
- Regularly attend and represent the AOB at key events in the community and build a robust network of donors and prospects
- Identify, target, develop, and steward relationships with the AOB's dynamic donor base and other prospecting channels
- Develop a comprehensive plan to include upgrading current donors and identifying and soliciting new donors to meet targeted goals
- Work strategically across AOB departments and programs to ensure donors feel connected to the organization
- Foster opportunities for other AOB staff and leadership to connect with donors. Collaborate to prepare in-depth briefing documents in advance of such meetings
- Prepare written documents in support of solicitation, cultivation, and advancement events, including correspondence, strategic plans, invitations, reports, and highly tailored proposals
- Provide monthly and annual reporting related to major donor fundraising, including, but not limited to, active major donor reports, prospect reports, and progress toward established goals
- Manage current donor and prospect cultivation and solicitation plans within Raiser's Edge

Planned Giving

- Implement and market a new Planned Giving program. Ensure that the program becomes an integrated part of the overall Advancement effort. Work closely with the Chief Advancement Officer and other AOB leaders in the integration of an aggressive program as it relates to endowment efforts.
- Meet with planned gift prospects and their advisors, prepare financial illustrations of proposed gifts, and draft gift agreements for review by prospects and their advisors
- Organize and conduct seminars for prospective donors, professional financial and estate planners, and other constituencies



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- Work with the AOB and CCF communications and marketing colleagues to develop and produce materials to market the Planned Giving program and write articles that highlight planned gift opportunities
- Establish procedures for tracking and qualifying prospects, recording, and reporting gifts, and referring all gifts requiring approval to the appropriate areas for acceptance

### **Parish Support**

- Conduct personal visits to the assigned parish/region to cultivate, solicit, and steward donors supporting established AOB fundraising priorities; this professional is expected to secure a minimum of 10-15 quality personal visits (QPVs) per month throughout the fiscal year on an annual basis
- Support the Chief Advancement Officer, Senior Director of Philanthropy, and other advancement fundraisers on all matters about increasing the number of donors who give at the Annual Appeal for Catholic Ministries leadership-level (contributions between \$1,500 and \$10,000)
- Execute events and other fundraising activities that advance the AOB's relationship with donors and prospects
- Assist in the development and implementation of leadership and major gift strategies in parish capital campaigns
- Provide support to parish capital campaigns as needed
- Work with the Senior Director of Philanthropy, Advancement Directors, Pastors, and Parish Leadership to develop a major giving strategy to be implemented at parishes; this strategy would include identifying, cultivating, and soliciting major donors to support the annual parish offertory
- Serve as a resource to parishes, be available for major gift training and consult
- Identify and engage major donors within the parish communities to establish a pipeline of new donors to support AOB Fundraising priorities

### **Secondary Duties and Responsibilities**

- Other duties and special projects may be assigned to meet the department's and the organization's needs

### **Experience, Knowledge & Skills Required**

- Clear, compelling, and persuasive presenter/public speaker and writer, able to share your passion about the AOB and CCF's mission to inspire others to support a variety of programs
- Successful fundraising track record with an emphasis on leveraging planned giving vehicles to bolster major gifts growth
- Self-starter and team-oriented with an entrepreneurial spirit who can construct creative solutions
- Possess the initiative, patience, and resourcefulness in adapting to change and responding to opportunities in an entrepreneurial environment
- Ability to work collaboratively and collegially with immediate team members
- Solid editing and researching skills, excellent communication abilities (oral and written), strong attention to detail, and organizational skills
- Experience with donor database software and relationship management processes
- Ability and inner drive to adhere to best practices for fundraising, donor communications, events, stewardship, and development principles and practices
- Proven attention to detail, accuracy, and timeliness
- Ability to work independently and as a member of a high-functioning team
- Ability to anticipate needs and complete tasks proactively
- Pursue continued education programs to update job knowledge and expand personal network

### **Minimum Education and Work History Experience**

- Bachelor's Degree
- Five or more years of fundraising experience specifically focused on major gifts and planned giving
- Working knowledge of planned giving techniques, current trends in philanthropy, and basic estate and financial planning for individuals, including tax implications of charitable giving
- Specific fundraising certifications such as CAP, CFRE, CSPG, FCEP are a plus
- Preference given to candidates with an understanding of the Archdiocese of Baltimore's philanthropic community



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### **Other Required Qualifications**

- Ability to work a flexible schedule, including some evenings and weekends. This position is based in Baltimore, MD, with opportunities for remote work
- Extensive travel across Maryland is expected to manage a portfolio and meet with donors, pastors, and other key stakeholders
- Experience with integration of strategy into an organization's greater vision, mission, and goals
- The ability to be flexible in working independently as well as collaboratively with organizational leaders and other staff to define and achieve goals for the greater good of the organization
- Understanding and appreciation for the mission of the Roman Catholic Church within the Archdiocese of Baltimore
- Outstanding written, technical, and other communication skills
- Positive attitude, proven ability to work successfully with diverse populations and demonstrated commitment to promote and enhance diversity, equity inclusion and participation (DEIP) solicitation strategies and within the workplace

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