

DIOCESE OF ALLENTOWN
Office of Stewardship & Development
Position Description

Position Title: Strategic Gifts Officer

FLSA: Exempt

Job Status: Full-Time

Reporting Functions: Reports to the Executive Director of Stewardship and Development

Job Function: The Strategic Gifts Officer will work closely with the Executive Director of Stewardship and Development to implement and manage planned giving programs, cultivate major gift opportunities, and support fundraising initiatives that advance the mission and development goals of the Diocese. Additionally, the Officer assists Diocesan parishes, schools, Catholic Charities, and other ministries as needed to create programs and efforts which secure local, charitable support. Will also manage cultivation, solicitation, and stewardship for a donor portfolio including at least one hundred significant and potentially significant individual donors.

Duties and Responsibilities:

Planned Giving Responsibilities

- Develop and implement a comprehensive planned giving program
- Identify and cultivate potential planned gift donors
- Prepare and deliver presentations to prospective donors
- Collaborate with legal, financial, and estate planning professionals to facilitate planned gifts
- Maintain detailed records of donor interactions and planned giving activities
- Provide regular updates and reports on planned giving program progress
- Coordinate stewardship activities to recognize and honor planned gift donors
- Develop marketing materials and communication strategies for planned giving
- Conduct donor research to identify new opportunities
- Offer tailored giving options that align with donor interests and financial goals
- Organize donor recognition events and legacy society gatherings
- Ensure compliance with all relevant regulations and ethical standards.

Major Gifts Responsibilities

- Identify and cultivate relationships with major gift prospects.
- Develop and implement personalized stewardship plans for major donors.
- Manage a portfolio of major gift prospects and donors.
- Coordinate and execute major gift solicitations.
- Collaborate with senior leadership to develop strategic fundraising initiatives.
- Prepare and present proposals to potential donors.
- Track and report on progress towards fundraising goals.
- Engage in regular donor outreach, including phone calls, emails, and face-to-face meetings.
- Plan and host donor cultivation events.
- Maintain accurate and detailed records of donor interactions in the CRM system.
- Ensure compliance with all relevant regulations and ethical standards in fundraising.

Other Responsibilities:

- Manage a donor portfolio including at least one hundred significant and potentially significant individual donors.
 - Develops, in consultation with the Executive Director a strategic plan for cultivation and solicitation of donors and prospective donors.
 - Personally cultivate and solicit a portfolio of major donor prospects and steward these individuals to become major/planned giving donors.
 - Assist the Executive Director with the preparation of visits with major/planned giving donors and major gift prospects. Prepare strategy memos and reviews research before visits. Accompany other staff and/or volunteers on visits when appropriate.
 - Work with Administrative staff to conduct research on donors and prospective donors as needed.
 - Create ongoing call reports and monthly activity reports that accurately reflect caseload activity and performance.

Additional Conditions of Employment

Due to the nature and mission of the Catholic Church, all employees are bound to exhibit respect for the teachings and discipline of the Church regarding matters of faith and morals, including maintaining a lifestyle that is in conformity with the teachings of the Catholic Church.

Educational Requirements

- Bachelor's Degree (preferred)
- At least 3-5 years of fundraising, marketing, or related experience.

Other Requirements

- Familiarity with principals of fundraising including annual appeals, major gifts, planned giving and donor databases.
- Strong Microsoft Office Skills (Excel, Word, Outlook, PowerPoint)
- A high degree of integrity, confidentiality, strong work ethic and a willingness to quickly and continuously gain knowledge of the mission of the Diocese of Allentown and its affiliates.
- Ability to learn and utilize donor databases and other fundraising software (BlackBaud/ Raiser's Edge, Omatic, OneCause, FreeWill, ParishSoft, etc.).
- Ability to handle multiple tasks/projects and prioritize as needed. Solid relationship-building skills and ability to work with diverse array of people and personalities under pressures and deadlines.
- Strong verbal and written communication skills with the ability to work with all levels of management, personnel, and donors.
- Strong organization skills and the ability to set priorities are critical. Candidate should be self-assured, independent, and capable of being a highly motivated self-starter.
- Must have a valid driver's license

Physical Demands: While performing the duties of this job, employees are regularly required to sit, walk and stand; talk or hear, both in person and by telephone. Use of hands to operate standard office equipment; with occasional reaching and lifting up to 10 pounds.

Working Conditions: Normal office environment. Normal work hours are Monday through Friday, 8:30 a.m. to 4:30 p.m. Will be required to meet with constituencies outside and in excess of normal work hours. Participation in evening and weekend activities in addition to significant driving throughout the diocese, which includes the Pennsylvania counties of Berks, Carbon, Lehigh, Northampton and Schuylkill, are an essential part of the position.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all responsibilities, duties, and requirements.

Range: \$80,000-\$85,000

Interested applicants must submit a cover letter and resume via email or to the following:

resumes@allentowndiocese.org

FAX: 610-439-7693

Diocese of Allentown

Attn: Human Resources

P.O. Box F

Allentown, PA 18105-1538

EOE M/F/D/V