



JOB DESCRIPTION

POSITION: Major Gifts Officer

REPORTS TO: President, Catholic Foundation of Eastern Pennsylvania

STATUS: Salary Exempt, Full-time

Candidates must live in the Lehigh Valley, Pennsylvania region with preference given to residents or work experience in Berks County.

POSITION DESCRIPTION

The Regional Gift Officer is responsible for identifying, qualifying, cultivating, soliciting, and stewarding major gift and planned giving donors and prospects with the goal of establishing or increasing endowment funds for Catholic Foundation partners in Berks County, Pennsylvania.

The Regional Gift Officer will collaborate closely with key leaders at Catholic parishes, schools, and ministries (pastors, principals executive directors, and key volunteers) in Berks County to identify and educate institutional and individual donors and prospects on the impact endowment funds have on the future financial viability of Catholic organizations.

Programs that the Regional Gift Officer will focus on include new business development by establishing parish, school, scholarship, ministry and cemetery endowment funds; Individual and Family Endowment Funds to endow annual giving; and ongoing efforts to help Catholic Foundation partners market and grow their established endowment funds through an active Partner Program volunteer effort.

The Regional Gift Officer will work closely with the Foundation President to establish goals that align with the Catholic Foundation's Strategic Plan. The Regional Gift Officer and the Foundation's Director of Philanthropy will coordinate efforts.

The chosen candidate requires an understanding of and commitment to the mission, vision, and goals of the Catholic Foundation of Eastern Pennsylvania and the Catholic Church and follows ethical fundraising practices in all matters.

ESSENTIAL DUTIES & RESPONSIBILITIES:

Work to establish new endowments or assist in the growth of existing endowment funds for Catholic organizations in Berks County. Assist partners in identifying and cultivating top donors. Meet with donors to establish Individual and Family Endowment Funds to endow annual giving.



Meet on a regular basis with the trained volunteers at each of the Catholic Foundation's partners in Berks County to assist and guide them in an active Partner Program of marketing and growing current endowment funds with emphasis on Planned Giving.

Coordinate, with the Foundation's Operations and Administrative Specialist, the scheduling of information and planned giving workshops for potential donor constituencies, including pastors, parish finance councils, individuals, and financial advisors; and the creation of advertisement for partner publications (bulletins, newsletters, e-newsletters), websites and social media outlets.

Meet with endowment and planned giving prospects and their attorneys and financial advisors as appropriate.

Work with the Catholic Foundation's Operations and Administrative Specialist to maintain donor records, and partner and donor communications and donor acknowledgement.

Identify marketing and public relation opportunities (news & feature stories, etc.) for partners and the Catholic Foundation.

Provide progress reports to the Catholic Foundation President.

Perform additional duties as requested by the Catholic Foundation President.

QUALIFICATIONS:

Five+ years frontline fundraising or direct in-person frontline sales experience, with major account or major and planned gifts experienced preferred.

Five+ years in program management.

Bachelor's degree preferred.

KNOWLEDGE, SKILLS, & ABILITIES:

Excellent communication (verbal, written, listening, social media) and people skills (organized, self-starter, pleasant and professional demeanor, ability to build and maintain relationships, diligent, and adheres to deadlines).

Demonstrated success in managing a portfolio of accounts including account management, prospecting, follow-through, closing, goal setting, and ongoing customer service/stewardship.

Experience in or an understanding of nonprofit fundraising and basic planned giving elements, as well as engaging and managing donors, is helpful.

Willingness to adhere to the ethical and legal issues around fundraising, and adherence to the Association of Fundraising Professional (AFP) Standards.



Ability to work a flexible schedule and attend evening, weekend meetings or events.

Knowledge of donor management software, such as Foundant, and comfortable using Microsoft Word, Microsoft Excel, Google Drive, and other online technology platforms to create efficiencies.

THE CATHOLIC FOUNDATION OF EASTERN PENNSYLVANIA

The Catholic Foundation of Eastern Pennsylvania is a charitable, non-profit 501(C)3 organization, independent from the Diocese of Allentown. Formed in 2013, it was designed to manage endowment assets, generate perpetual income and provide financial stability for Catholic parishes, educational institutions, and ministries. The Catholic Foundation currently manages more than \$50 million in assets for 115 partners in 147 separate endowment funds.

HOW TO APPLY

Please email your resume and cover letter to petewaldron@catholicfoundationep.org.