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POSITION TITLE: Planned Gift Officer

DEPARTMENT: Development / Foundation

REPORTS TO: Director of Planned Giving

FLSA: Exempt (Full-time – 40 hours, benefits eligible)

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. Strong written communication collaborating directly with donors every day establishing relationships.
4. Assists parishes with the implementation and growth of planned giving committees (Legacy Society), including the establishment of a Parish Legacy Committee for 93 parishes.
5. Travels to parishes to provide on-site leadership, guidance, and support building strong relationships.
6. Develops and monitors timely reports relative to planned gift strategies and benchmarks.
7. Track and record expected, pending, and mature planned gifts.
8. Provide assistance with Catholic Heritage Society events.
9. Performs other duties as assigned.

REQUIRED Education, Experience and Skills:

- Bachelor's degree and 3 - 5 years of demonstrated experience in the field of professional fund development, with 3 years specific to planned giving preferable.
- 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, and Outlook.
- 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.

PREFERRED Education, Experience and Skills:

- Community, Catholic Foundation, or diocesan experience preferred.
- Blackbaud Raiser's Edge/NXT experience preferred.
- Experience in ResearchPoint preferred.

WORKING ENVIROMENT: Must be willing to travel within the Diocese of Charlotte. Office hours are 9:00 a.m. – 5:00 p.m., Monday through Friday with hours varying due to travel, evening, or weekend work.

BENEFIT PACKAGE:

- Paid Vacation, Sick, and Holidays (standard civil and religious holidays)
- Medical, Dental, Vision, 403(b), Life and Disability benefits.