

**CATHOLIC CHARITIES OF THE DIOCESE OF SANTA ROSA
JOB DESCRIPTION**

NOTICE: This job description is provided as a general summary of common job duties performed by individuals assigned to this job title. It is not all-inclusive, nor is it intended to create a contract, written or implied, between employees and Catholic Charities, nor does it in any way alter the employment at-will relationship that exists between employees and Catholic Charities. As a condition of employment, all agency employees are expected to perform job duties assigned by agency management even when such duties are not included in their job description.

JOB TITLE: Major Gifts Officer
REPORTS TO: Chief Development Officer
EMPLOYMENT STATUS: Exempt
TIME COMMITMENT: Full-Time
SALARY: \$100,000- \$125,000/ Year

Position Summary

The Major Gifts Officer works to secure significant gifts in cash, pledges, securities, and planned gifts for Catholic Charities with a One Agency lens, keeping the Mission, Vision, Values, and policy and procedure in alignment. The primary responsibilities of the Major Gifts Officer include identifying, qualifying, cultivating, soliciting, and stewarding individual donors and legacy prospects. The Major Gifts Officer ensures compliance with relevant ethical guidelines, laws, policies, and procedures, and continually researches and implements best practices. The Major Gifts Officer frequently represents Catholic Charities in external settings as a representative of Catholic Charities in the community.

Dimensions

Agency-wide Committees:	Leadership Team				
Approval Procedure/Authority	Signature Authority:	Per	Agency	Financial	Processing
			Levels		

Leadership Team Functions

1. Responsible for managing specific departments or functions and implementing the strategies set by the agency.
2. Develop and implement plans to improve operational efficiency.
3. Ensure cross-department collaboration and integration that supports the agency's growth strategy, operational delivery, data collection needs, and mission-based culture.
4. Direct the development and management of all assigned budgets including monthly review of revenue and expense activity within agency parameters.
5. Recognize risk trends and make suggestions for improvement.

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6. Identify organizational, community and market trends and make recommendations for improvement that can positively impact services and organizational effectiveness; adopt best practice standards with a focus on continuous improvement.
7. Direct and manage employees (managers and supervisors) responsible for operations. Monitor progress, course correct, as needed.
8. Design and manage programs or service areas connected to promising or best practices and established outcomes.
9. Develop and implement policies and procedures in line with agency best practice standards. Ensure that all supervisors and staff members in the department understand these and work accordingly.
10. Represent Catholic Charities and develop positive relationships with partners throughout the communities we serve.
11. Identify and develop program-specific outcomes to ensure program effectiveness and impact with the ability to report that to internal and external stakeholders.
12. Oversee department compliance with training and make best practice training recommendations.
13. Direct and oversee reports and statistical analysis of activities as required by the agency. Ensuring that requests for data and reporting meet compliance with grants and funding agency requirements.
14. Ensure managers and supervisors are trained and actively implementing tools and approaches to support all staff.
15. Actively role model and create actions and conditions for agency alignment with mission, vision, values and leadership team agreements.

Essential Functions

1. Maintain a personal portfolio of 100-150 donors in the \$10k+ annual giving range including identification, cultivation, solicitation, data tracking, and stewardship.
2. Develop individualized cultivation, ask, and stewardship plans for each major donor and train other fundraisers to do the same.
3. Assist and support the Chief Executive Officer (CEO) and Chief Development Officer (CDO) on managing their own personal portfolio. With the advice and guidance of the Major Gift Officer, the CEO is responsible for maintaining relationships and stewarding Catholic Charities' top 20 donors. The CDOs portfolio is comprised of 30-40 key donors. Responsibilities for the Major Gift Officer include producing thorough research on giving capacity, developing a personalized advancement strategy, keeping the CEO and CDO on track with each of their assignments using Moves Management tactics, and ensuring that the CEO and CDO have pertinent information on each individual's giving history, program preferences, and all previous organizational relationships.

4. Engage and support Board members who elect to take on donor stewardship relationships ensuring that they have relevant, up-to-date information on each of their assigned names and are provided with periodic suggestions for outreach touches.
5. Provide input on preparing and implementing the annual Develop Plan and Case for Support.
6. Create and execute a plan for increasing the number of major donors with a focus on promoting those giving just below the major gifts threshold and recruiting first-time donors at the major gifts level through targeted events and acquisition strategies.
7. Design and implement a comprehensive, sustaining program to identify planned giving prospects, present planned giving opportunities through individual and mass-market means and, working closely with Catholic Charities' Marketing and Communications team, ensure that every piece of agency correspondence and communication includes a reminder message promoting planned giving.
8. With the CDO, develop annual budget and performance targets to assure major gifts measures increase revenue from planned gifts (year-over-year) as well as growth in the number and retention of major donors. Manage planned giving metrics to include the number of new, confirmed gift commitments and the number of face-to-face planned giving conversations with qualified prospects.
9. Participate in drafting annual fundraising revenue projections based on historical performance, current capabilities, and future economic trends. Develop goals and strategies for achieving projected revenue. Participate in monthly analysis of progress toward annual fundraising revenue goals and weekly portfolio review meetings with other frontline fundraisers.
10. Help support healthy crossover between donors and volunteers, particularly for high-net-worth individuals. Maintain a climate that attracts, retains, and motivates top quality volunteers, especially fundraising volunteers.
11. Support the gift acknowledgment, tracking, stewardship and cultivation processes for all gifts of \$1K+. Perform regular audits to ensure that all major gifts and legacy gifts, biographical information, and relevant actions are tracked accurately in Raiser's Edge.
12. Support Board recruitment, onboarding, and stewardship in partnership with CDO as directed. Provide support to individual Board members to ensure a healthy focus on fund development.
13. Serve as an articulate and appropriate spokesperson and advocate for Catholic Charities' mission and programs in the community and elsewhere by participating in and attending community meetings and events to establish strategic relationships.

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14. Support the Mission, Vision, and Values of Catholic Charities in the performance of all essential job functions and responsibilities.

Note: Catholic Charities considers this position to be a mandated reporter of child abuse and elder abuse.

Other Responsibilities

1. Requires travel throughout Sonoma, Lake, Mendocino, and Napa counties.
2. Requires flexible schedule including weekend and evening work as needed.
3. Work with the Diocese of Santa Rosa and local parishes as appropriate and requested.
4. Perform other related duties as assigned.

Agency Culture

It is essential that all employees of Catholic Charities aspire to the following:

- *A commitment to the agency's mission, vision, and values.*
- *A commitment to excellence in everything we do.*
- *A commitment to performance and quality improvement.*
- *A commitment to outcomes and measured results.*
- *A commitment to innovation and to what is possible.*

Education, Experience, and Skills Required

1. Bachelor's degree and a minimum of 5 years of experience as a frontline fundraiser required. An additional 4-6 years' experience in fund development, communications, and volunteer coordination may substitute for a Bachelor's degree.
2. Membership in the Association of Fundraising Professionals (AFP) is expected.
3. Demonstrated experience and confidence in asking people to contribute time and money. Must be comfortable being in the public eye.
4. Demonstrated knowledge of the best practices of fundraising, communications, and volunteering. Demonstrated experience and confidence successfully securing 5-figure gifts from private and public sources.
5. Demonstrated ability to successfully plan and achieve short-term and long-term fundraising goals; enthusiasm and ability to be a self-starter in the achievement of ambitious fundraising efforts.

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6. Ability to work independently, collaborate effectively, and work as part of a team. Cooperative, friendly, proactive, and helpful attitude with clients and co-workers of all ages and socio-economic backgrounds.
7. Computer literacy required including demonstrated proficiency with Microsoft 365 Suite; familiarity with databases; willingness to learn and apply new software and platforms as necessary for the work.
8. Familiarity with Raiser's Edge donor management software, or similar software, along with a commitment to maintaining the integrity of donor data.
9. Excellent written and verbal communication; organization, fundraising, conflict resolution, problem-solving, analytical, and abstract reasoning skills. Must be able to convey information and ideas clearly and quickly utilizing a high-level of initiative, judgement, and critical thinking skills. Ability to manage confidential information.
10. Excellent organizational skills needed. Must be able to prioritize multiple responsibilities properly and handle multiple tasks relating to concurrent development projects. Ability to develop and implement strategic and operational plans.
11. Excellent interpersonal skills, cooperative, friendly, proactive, and helpful attitude with clients and co-workers. Ability to work closely with clients and other employees to ensure a positive and constructive environment within the program or department and throughout the Agency.
12. Passion and enthusiasm for the mission of Catholic Charities to care for the most vulnerable members of our community to transform their lives through dignity, hope, and love, including the ability to confidently speak the language of the Catholic faith and Catholic Social Teaching with donors, volunteers, and staff.
13. Valid driver license and at least state required minimum of automobile insurance, clear DMV driving record and ability to provide own transportation. Must be willing and able to travel between agency sites.
14. Must pass DOJ background clearance (fingerprinting) in accordance with the Diocese of Santa Rosa's policies prior to start of employment.
15. Bilingual (English/Spanish) preferred, but not required.

Job Analysis/Job Description Physical Requirements

The physical demands described here are representative of those that must be met by an

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employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to sit and use hands to finger, handle, or feel. The employee frequently is required to reach with hands and arms and talk or hear. The employee is often required to stand, walk, travel, and stoop or bend. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Must be able to sit or stand for extended periods while using a computer.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Frequent incoming telephone calls, scanners, and copiers as well as a wide range of clients or at times clients in distress contribute to a noise level of average to above average.

Equal opportunity employer

Catholic Charities of the Diocese of Santa Rosa is an Equal Opportunity Employer, seeking the best and brightest. Our organization does not discriminate against or harass any employee or applicant for employment because of race, color, creed, religion, national origin, sex, disability, age, marital status, membership or activity in a local human rights commission, or status with regard to public assistance. We support, educate, create opportunities for, and ensure the wellbeing of our staff for the betterment of those most in need.

CCDSR participates in E-Verify, an Internet-based system that compares information entered by an employer from an employee's Form I-9, Employment Eligibility Verification, to records available to the U.S. Department of Homeland Security and the Social Security Administration to confirm employment eligibility.

For further information and application submittal please visit our careers page
<https://www.srcharities.org/about/careers.html>