

Job Title: Major Gifts & Planned Giving Officer

Location: Glenmary Headquarters, Fairfield, OH

Classification: Exempt (FT)

Purpose: The Major Gifts & Planned Giving Officer is responsible for the implementation and execution of activities associated with major and planned gifts.

Essential Job Responsibilities:

- Assists in the planning, coordinating and implementation of Glenmary's developmental activities.
- Develops an annual budget for Major Gifts and Planned Giving.
- Working with the appropriate resources, directs research that identifies major gift and planned gift prospects, their financial capabilities, special interests and past giving history to Glenmary and other charitable interests, including annuities, charitable trusts, bequests, etc.
- Participates in a variety of top-level fund-raising activities.
- With the Director, develops a predetermined number of donors and prospects to visit annually.
- Cultivates and visits potential major donors and prospects to learn about their philanthropic goals and connect each person to Glenmary in a meaningful way that will result in sustainable income.
- Creates an environment that will assist the efforts of the Executive Council, the Director, selected Glenmary members and other staff or volunteers to solicit annual gifts and pursue planned giving options with major donors and prospects.
- Develops and maintains donor files.
- Carries out activities that recognize and involve major donors. Including the coordination of the Annual Father Bishop Legacy Society event.
- Involved in the direction and evaluation of Planned Giving.
- Works with the Director, development staff and the Communication department in planning the design and updates of the departmental materials used in presentations to donors.
- Works with the Finance Office to coordinate and implement multiple state reporting requirements for annuities, planned giving and major gifts.
- Supervises, trains and coordinates the work pertaining to Planned Giving.
- Other duties and responsibilities as assigned by the immediate supervisor.

Education/Experience: Minimum of bachelor's degree in business or related field required (Master's degree preferred). five to eight years of practical development experience (non-profit and/or religious) preferred. Tangible experience of having expanded and cultivated existing donor relationships over time. Good knowledge of federal and state tax planning techniques favoring charitable giving.

Communication Skills/Requirements: Extensive oral and communication abilities. Strong interpersonal and professional skills. Strong listening skills and ability to develop rapport with people of all ages, economic backgrounds and cultures. Must be flexible, self-confident, assertive and persuasive. Knowledge of and effective use of a variety of social media tools to accomplish goals. Able to communicate verbally in person, electronically, via telephone or in writing with all previously identified sources.