



Gift Planning Officer

The **Catholic Foundation for the Archdiocese of New Orleans** is seeking an experienced professional to serve as **Gift Planning Officer (GPO)**. The GPO promotes and represents the work and mission of the Catholic Foundation to individuals and families in the Archdiocese of New Orleans. This position is responsible for educating and cultivating charitable gifts from donor constituencies of the Catholic Foundation for the Archdiocese of New Orleans. The GPO works directly with individuals and families to help create suitable philanthropic plans that ultimately support our Catholic community. The GPO also provides support to parishes, schools, and nonprofit ministries in implementing basic planned giving programs and will work with other Catholic Foundation staff members to achieve these goals.

Position Responsibilities:

Identification, Cultivation, Solicitation and Stewardship of New Individual Prospects / Donors

- Manage a portfolio of approximately 150 prospects and donors, proactively reaching out to establish relationships, consistently following up with active prospects in the pipeline, and moving prospects from initial interest through fund establishment to ongoing stewardship.
- Conduct meetings, in person and on the phone, with individuals and families interested in learning more about supporting the Archdiocese of New Orleans through the Catholic Foundation.
- Proactively build relationships with Catholic Foundation individuals and families, discover philanthropic interests and passions, and cultivate deeper engagement with the Catholic Foundation by serving those philanthropic passions.
- Assist in the planning of and attend all Catholic Foundation events designed to support the donor engagement efforts of the Foundation. This requires some evening and weekends.

Cultivation, Solicitation and Stewardship of Existing Individual Prospects/Donors

- Respond to questions and inquiries raised by existing donors, working to go “above and beyond” in levels of service and responsiveness.
- Work collaboratively with Gift Planning and other Foundation staff on creating, improving, and implementing donor engagement strategies designed to increase the awareness of and engagement with the Foundation’s mission and work among current and prospective Foundation constituents.

Catholic Community Education

- Work collaboratively with the Director of Gift Planning on parish relationships, assisting with estate planning seminars.
- Support parishes, schools, and ministries in implementing planned giving programs.

Requirements:

- Education: Undergraduate degree required. Graduate/law degree or its equivalent preferred.
- Experience: Five+ years of experience in field, including fundraising and development activities, institutional financial services management or sales, and/or estate or charitable planning.
- Knowledge, skills, and competencies: Understanding of planned gifts and other charitable vehicles – including donor advised funds, charitable gift annuities, charitable trusts, endowed funds, gifts of life insurance, gifts of retirement assets, and others. Familiarity with drafting of documents – endowments, donor advised fund agreements, estate plans, real estate transfer agreements. Experience with managing a portfolio of prospects; qualifying, tracking activities, and managing development processes. Ability to work independently and proactively, managing a portfolio of donors while responding to and prioritizing a variety of other demands on time. Willingness to work collaboratively, to be adaptable to changing needs of organization, and interest in working in a dynamic environment.
- Demonstrable computer literacy: Microsoft Office Suite, Raiser's Edge, planned gift software (PG Calc preferred).
- Personal Attributes: Impeccable integrity, confidentiality, and a positive, "can do" attitude.

Qualified candidates are encouraged to send resumes and cover letters to: breilly@arch-no.org.

Application deadline is September 30.

