

## POSITION ANNOUNCEMENT

### THE CATHOLIC DIOCESE OF CLEVELAND

#### DIRECTOR OF PLANNED GIVING FOR THE CATHOLIC COMMUNITY FOUNDATION

#### FULL-TIME, EXEMPT STATUS POSITION

The Catholic Diocese of Cleveland was founded on April 23, 1847. Under the leadership of the Most Reverend Edward C. Malesic, bishop of Cleveland, it is the twenty-third largest diocese in the United States. The diocese encompasses the Ohio counties of Cuyahoga, Summit, Lorain, Lake, Geauga, Medina, Wayne and Ashland. There are more than 677,000 Catholics in the Diocese, and Catholic Charities- Diocese of Cleveland is one of the largest diocesan systems of social services in the world. There are 185 parishes, 110 Catholic schools, 1 pastoral center and 1 mission office within the diocese.

Please go to our website, [www.dioceseofcleveland.org](http://www.dioceseofcleveland.org), for more information about the mission, persons, and ministries of our diocese.

Under the direction of a Senior Relationship Manager for the Catholic Community Foundation, the Director of Planned Giving is to plan, direct and lead the Catholic Community Foundation's (CCF) overall planned giving marketing efforts. Facilitate, direct and support parish planned giving efforts. Manage a portfolio of Planned Giving donors. Direct CCF's efforts and serve as representative to the professional advisor community.

#### **Duties and responsibilities include, but are not limited to:**

1. Plan, direct and lead CCF's overall planned giving marketing efforts, in coordination with the Executive Director, Director of Development and Director of Communication.
2. Develop and evaluate comprehensive plan to identify new planned giving leads necessary to achieve CCF's annual goal for unrealized planned gifts.
3. Direct cultivation plan for all planned giving donors, with the goal of moving donors along the planned giving life cycle from awareness to consideration to implementation to documentation and stewardship of planned gifts and donors.
4. Direct and execute stewardship of CCF's Heritage Society (HS) donors. Responsibilities include Heritage Society event, developing annual communication plan for assigned and unassigned HS donors, annual review of documented planned gift donors to ensure accuracy and guide stewardship efforts appropriately.
5. Grow and manage a portfolio of planned giving donors with a goal of increasing annual, planned, and potentially major gifts from these donors.
6. Lead parish-based planned giving marketing efforts to help parishes establish and grow parish legacy giving programs by providing guidance, support and CCF template materials. Advise pastors and key staff on appropriate marketing plans. Coordinate and attend CCF charitable gift and estate planning seminars. Provide monthly communication plan to parishes including information on planned giving, IRA charitable rollover and stock gift options for parishioners.
7. Increase CCF's visibility in the professional advisor community by maintaining and developing relationships with key advisors, planning annual continuing education seminar, leading Professional Advisory Committee, and developing and carrying strategies to raise CCF's profile with this group.
8. Other duties as necessary.

## Qualifications

- Demonstrated commitment to the values, beliefs, traditions and teachings of the Catholic Church. Ability to uphold Catholic values, beliefs, traditions, and teachings of the Catholic Church in working with donors and colleagues toward excellence in Christian Stewardship.
- Bachelor's degree in relevant field. Experience, certification, and training in lieu of a bachelor's degree will be considered.
- Three to five years of experience in donor relations, marketing, sales, client services, or similar industry.
- Successful experience in creating and sustaining fruitful professional relationships.
- Enthusiasm and excitement in making the case for support, while recognizing the needs and situation of each audience.
- Excellent written and oral communication and networking skills with the ability to engage, inspire, and educate in personal meetings and group settings. Successful experience in public speaking and presenting to groups and individuals.
- Bilingual in English and Spanish a plus.
- Robust and successful experience in collaboratively working with diverse groups toward achieving goals and fulfilling outcomes.
- Experience and ability to manage data relative to donor relationships.
- Experience in best practices in stewardship, fundraising, or sales management.

Please submit cover letter, resume, and contact information for three (3) professional references and completed [Diocese of Cleveland Employment Application](#) to [jdamico@dioceseofcleveland.org](mailto:jdamico@dioceseofcleveland.org). In the subject line please enter: "Director of Planned Giving." Position will remain open until filled. Formal review process of all complete submitted materials to identify candidates for interview will begin on January 10, 2021.