



Donor Advisor/Major Gifts Officer Position Description

Organization: Catholic Leadership Institute

Reports to: Vice President, Philanthropy

FLSA Status: Exempt

Approval: Dan Cellucci

Effective Date: July 2019

Vision:

We see a world where each individual understands their God-given mission in life and is doing their best to fulfill it; a world where Catholic leaders are influential voices in society; a world where Jesus' example of loving, servant leadership is modeled in every family, workplace, parish, and community.

Purpose:

Catholic Leadership Institute (CLI) provides bishops, priests, deacons and lay persons in the Roman Catholic Church with world-class, pastoral leadership formation and consulting services that strengthen their confidence and competence in ministry, enabling them to articulate a vision for their local church, to call forth the gifts of those they lead, and to create more vibrant faith communities rooted in Jesus Christ.

Position Summary:

The Donor Advisor/Major Gifts Officer at Catholic Leadership Institute will design, develop and implement our major gift program. The selected candidate will be responsible for managing and cultivating relationships with existing major gift prospects, as well as identifying and engaging new prospects. An ability to empathize with donors and clearly communicate our organization's mission is key. Expectations are that the Donor Advisor will energize team members, persuade prospects and persevere to the end. We have included in the title Donor Advisor deliberately since we believe that this position is focused on donors and providing them with the best opportunities to have a significant impact. As such, the title of Donor Advisor better relays the focus of the position.

The Donor Advisor will be responsible for the following:

- **Identifying major gift prospects** – Our Donor Advisor must be prepared to assist in finding donor prospects; a process that involves analyzing factors that predict a donor's ability and enthusiasm to give. We will provide the Donor Advisor with necessary tools to accomplish this activity including electronic screening, modeling and prospect research. The Donor Advisor will also need to utilize

interpersonal skills and volunteer relationship management to assist in the process of identifying and connecting with new prospects via personal referrals.

- **Cultivating major gifts** - Cultivation is critical when it comes to major gifts because it is our opportunity to build valuable relationships with major gift prospects. Our Donor Advisor will need to be well-versed, accomplished and creative with this activity in order to succeed in the position.
- **Develop major gift solicitation strategies** – The Catholic Leadership Institute Donor Advisor will design and implement major gift solicitation strategies with potential major gift prospects. These strategies must be in-line with the mission of the organization and based on results-proven actions. The Donor Advisor will have activity benchmarks that will guide activity levels and create opportunities for meeting and exceeding organizational philanthropic support goals.
- **Grow major gift donor stewardship** – Major gift stewardship is a critical aspect of Catholic Leadership Institute’s philanthropy program. Our Donor Advisor will lead the way in creating and implementing major gift stewardship activities – both for the Philanthropy Team and an individual portfolio.

The individual accepting this position will, with demonstrated success, have opportunities for growth within the organization as the fundraising program evolves and develops. Travel of 50% or more required.

Position Requirements:

Education and/or Experience:

- Bachelor's Degree Required
- Minimum of seven years of professional development experience in fundraising with emphasis on activities and communications required to develop personal relationships and secure major gift level donors
- Personal experience with identification, engagement, solicitation and stewardship of major gifts with specific examples and statistical evidence of success

Critical Qualifications/Skills:

- Outstanding communication skills including the ability to listen effectively
- Natural relationship-builder who can find and make connections between people’s passions and the mission of the organization
- Self-starter who is persistent and flexible
- Organized individual who pays attention to detail and follows through with contacts in an appropriate timeframe
- Ability to manage a portfolio of donors through the donor engagement process from identification to stewardship
- Willingness to travel as needed
- Strategic thinking with ability to be innovative and creative in offering solutions to challenges
- Experience in working with the entire spectrum of donors from loyal to new prospects
- Ability to use referrals, networking, and research to grow a donor base
- Interest in advancing one’s career and earning additional responsibilities as part of an evolving Philanthropy team.
- Solid understanding of the Catholic faith

Key Responsibility Areas:

Area	Key Responsibilities
MAJOR DONOR & PROSPECT MANAGEMENT	Identify, inform and involve major donor prospects in the mission of Catholic Leadership Institute through their time, talent and treasure, so that resources are secured to carry out the mission of Catholic Leadership Institute and ensure that donors candidates feel deeply invested and engaged in that mission. Expected to meet a goal of 100+ personal meetings per year.
VOLUNTEER MANAGEMENT	Motivate, recruit and support board members and volunteers in the identification, cultivation and solicitation of donor candidates in order to secure philanthropic revenue for Catholic Leadership Institute.
DONOR COMMUNICATION	Prepare, deliver and follow-up on proposals and gift opportunities for major donor prospects after accurately assessing their level of interest and capacity in order to provide meaningful opportunities for involvement.
DEVELOPMENT STRATEGY	Plan, implement and track short-term and long-term major gift strategies with the Philanthropy Team in order to measure success and create accurate revenue, cash, and activity metrics for the organization.

Application Procedure:

A complete application includes a resume and a cover letter with salary requirements describing the candidate's reasons for considering the position and perceptions of what makes him/her a good fit. For consideration, please e-mail the cover letter and resume to: HumanResources@catholicleaders.org . Phone screenings will be made with selected candidates before face-to-face interviews.