

## **Position Announcement**

### **The Catholic Diocese of Cleveland**

#### **Planned Giving Relationship Manager for the Catholic Community Foundation**

##### ***Full-time, exempt status position***

The Catholic Diocese of Cleveland was founded on April 23, 1847. It is the twenty-third largest diocese in the United States. Under the leadership of the Most Reverend Edward J. Malesic, the diocese encompasses the counties of Cuyahoga, Summit, Lorain, Lake, Geauga, Medina, Wayne and Ashland. There are more than 670,000 Catholics in the Diocese, and Catholic Charities. There are 184 parishes, 107 Catholic schools, 1 pastoral center and 1 mission office within the diocese. The cathedral is the Cathedral of St. John the Evangelist, located in downtown Cleveland. Members of the diocesan staff support the Bishop in ministering to the people of God by working together to provide vision, leadership and service to continue the mission of Jesus to transform the world. As a community, they are committed to live by the values of faith, dignity, stewardship and justice.

The mission of the Catholic Community Foundation (CCF) is to foster faith-based stewardship in the community for the spiritual, educational and charitable needs of all.

Under the direction of the Senior Director of Major and Planned Gifts for the Catholic Community Foundation, the Planned Giving Relationship Manager will cultivate, solicit, and steward donors and prospects for planned gifts to the diocesan ministries and parishes. This individual manages a portfolio of current and prospective donors, builds relationships, and develops strategies to increase deferred, estate, and planned gifts, ensuring alignment with the mission and values of the Foundation.

#### **Responsibilities:**

Duties and responsibilities include but are not limited to:

- Facilitates, manages, and follows a disciplined and defined approach to “qualify” a donor portfolio with an objective of building a portfolio of 100-125 qualified planned giving donors.
- Oversees the management of this portfolio, with a focus on engaging donors in conversations about their legacy, including planned gifts through bequests, charitable gift annuities, trusts, and other giving vehicles.
- Develops strategies to cultivate, solicit, and steward assigned donors for planned and deferred gifts, with a focus on engaging donors to support the planned giving component of the diocesan campaign by presenting opportunities that align with their financial and charitable goals and the Foundation's priorities.
- Stewards donors with existing planned gifts for diocesan ministries, ensuring meaningful engagement with periodic meetings, personalized updates on the impact of their gifts, and acknowledgment of their current giving.
- Assists with donor acknowledgment and recognition program specific to planned giving donors, including members of the diocesan Heritage Society.

- Builds strong relationships with pastors, parish leaders, diocesan directors, and lay Board members to identify prospective planned giving donors and advance the planned giving objectives of the diocesan campaign.
- Maintains a knowledge of trends in planned giving, estate planning, and charitable giving, incorporating best practices into donor strategies and campaign efforts.
- Maintains a sufficient level of activity to meet desired departmental goals for planned giving donor communications and personal visits.
- Meets or exceeds general fundraising and periodic campaign-related goals for the planned giving component, including the number of planned gifts secured and overall financial commitments received.
- Performs other work-related tasks as required to support the overall success of the diocesan campaign and the Foundation's planned giving initiatives.

### **Qualifications:**

- Must be a practicing Catholic in full communion with the Church. 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 planned giving 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.

### **To Apply:**

Please submit cover letter, resume, and a completed Diocese of Cleveland Employment application, including contact information for three (3) professional references to [phudak@dioceseofcleveland.org](mailto:phudak@dioceseofcleveland.org). In the subject line, please enter "Planned Giving Relationship Manager". Application must be completed in full, please avoid advising to "see resume" within any application fields. Position will remain open until filled. Formal review process of all submitted materials to identify candidates for interview will begin on January 20, 2025.