



CATHOLIC FOUNDATION
of West Michigan

**Gift Planning Officer
Position Description**

POSITION TITLE: Gift Planning Officer
REPORTS TO: Executive Director
HOURS & FLSA STATUS: Full-time, exempt
EFFECTIVE: April 2025

About the Catholic Foundation of West Michigan:

The Catholic Foundation of West Michigan is an independent, 501(c)(3) Catholic community foundation endorsed by the Diocese of Grand Rapids and Bishop David J. Walkowiak. Established in 1995 by Bishop Robert J. Rose, the Catholic Foundation manages charitable funds and distributes grants for a variety of Catholic ministries throughout West Michigan.

As the heart of Catholic generosity for West Michigan, we assist members of our Catholic community in their philanthropy through a variety of professionally managed, socially responsible fund options that grow and distribute grants to make the largest – and longest lasting – impact possible on parishes, schools, and ministries.

Job Summary:

The Catholic Foundation seeks an experienced Gift Planning Officer to serve in the ministry of the Catholic Church by thoughtfully managing a group of assigned and qualified donors (caseload) for the development and stewardship of charitable contributions. This senior position oversees the major gifts process, which involves identifying, cultivating, and soliciting major donors, as well as leading a planned giving program.

This is a full-time, paid position offering a competitive salary and a comprehensive benefits package that includes health, dental, vision, and life insurance, as well as flexible spending accounts, retirement planning, and paid time off.

Primary duties and responsibilities:

- Manage a portfolio of major gift prospects in all aspects of the gift cycle: Identify, qualify, cultivate, solicit, and steward prospective major gift donors
- Provide leadership in creating, executing, and evaluating strategies of the planned giving program
- In partnership with the Executive Director and/or Bishop, make solicitations when appropriate

- Maintain a reliable process of gift acknowledgment, gratitude, and ongoing stewardship contact with donors
- Focus on retention and upgrading of donors
- Independently develop proposals and presentations that exhibit exceptional written and verbal communication skills that reflect well on the Foundation, the Diocese, and the Catholic organizations we serve
- Assist with the Foundation's stewardship efforts that support parishes in developing their ability to establish an engaged, financially stable spiritual community
- Work collaboratively with pastors and clergy, staff and lay leaders, and other diocesan offices and ministries when appropriate to support parishes with successful planned giving workshops and other fundraising strategies and goals
- Conduct appropriate and ethical research to identify and qualify prospective donors
- Build effective working relationships with attorneys, estate planners, trust officers, financial advisors, and other professionals involved in providing services to donors
- Keep current on trends in philanthropy and tax legislation affecting charitable giving
- Other duties as assigned

Performance Competencies :

- Strong working knowledge of fundraising principles
- Strong written/verbal communication while adhering to confidentiality
- Establish and maintain effective working relationships with a commitment to teamwork
- Ability to work independently while meeting and exceeding goals
- Adept at planning, prioritizing, organizing, and following through on a high volume of work
- Ability to multitask
- Ability to use appropriate technology (e.g. Microsoft Office, Blackbaud's Raiser's Edge, etc.)
- Commitment to innovate for continual improvement
- Courteous, analytical, proactive, and organized

Qualifications:

- At least two years of experience in fund development and/or project management
- Bachelor's degree required, graduate work preferred or equivalent experience
- Valid driver's license and reliable transportation to travel throughout the eleven-county diocese
- Ability to work with a fully supportive attitude alongside the Catholic Church, her teachings, and her work

To Apply:

Qualified candidates should submit via email 1) a letter of introduction, 2) a professional resume, and 3) at least two professional references with contact information to treid@cfwmi.org.