



THE BASILICA OF SAINT MARY

Position Description: Principal and Major Gift Officer

Date: Jan. 2, 2024

Employee Name:

Department: Mission Advancement

Supervisor: Managing Director, Mission Advancement – Terri Ashmore

Status: Full-time – Exempt

Schedule: 40 hours/week, some weekends / evenings required

Purpose of Position

Support the vision, mission, and values of The Basilica of Saint Mary and The Basilica Landmark by managing a portfolio of donors and prospects and leading the Gift Officers. Secure annual, major, and planned gifts for The Basilica and The Basilica Landmark.

Scope of Position

- Reports to and receives assignments from Managing Director, Mission Advancement.
- Supervises, assigns work, sets goals and conducts performance reviews for 2 Gift Officers (1ft and 1pt). Also, provides direction to 2 other ft staff with small gift portfolios who are not direct reports. Provides training to this group.
- Assists Managing Director with Gift Officer hiring decisions.

POSITION QUALIFICATIONS

Knowledge Skills and Abilities

- Bachelor's degree plus at least five years of experience in planned/major gift solicitation or equivalent
- Proven effectiveness in prospect identification, cultivation, and solicitation
- Outstanding written and oral communication skills
- Demonstrated knowledge of the solicitation, transfer, and management of charitable gifts
- Demonstrated knowledge of the ethical, legal and tax-related issues regarding the solicitation, transfer, and management of charitable gifts
- Experience working with a team of Gift Officers including supervisory experience
- Knowledge of Blackbaud Raiser's RENXT database software preferred

Physical Demands

- Must have a valid driver's license and access to a motor vehicle to use for work
- Work 40 or more hours per week when needed
- Must be able to stand for extended periods
- Able to walk up and down stairs

Mental Demands

- Possesses good people and listening skills
- Ability to work as an integral part of a team

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- Ability to work independently with minimal supervision and accomplish tasks within appropriate deadlines
- Ability and willingness to follow instructions
- Ability to maintain confidentiality
- Respects and values a diverse culture
- Works well with others and has a positive and helpful attitude, especially in times of high intensity

PRIMARY FUNCTIONS AND MAJOR ACTIVITIES

Lead a group of Gift Officers to identify, cultivate, solicit and close major and planned gifts to achieve organizational goals.

- Create strategies and match donor philanthropic goals with institutional needs to achieve organizational financial goals and meet cash flow needs.
- Lead a weekly pipeline meeting with Gift Officers and assigned support staff to set work plans and check in on Capital Campaign and Annual Fund progress.
- Conduct on-going cultivation and stewardship practices to recognize major and leadership gift donors and prospects.

Identify, cultivate, solicit, and close major and planned gifts to meet the Annual Funds' and Capital Campaign financial and cash flow needs of The Basilica of Saint Mary and The Basilica Landmark.

- Manage a portfolio of 125-150 major gift prospects and maintain a full schedule of personal meetings with donors and prospects.
- Work with development staff to evaluate and prioritize donor prospects, identify planned giving prospects and strategize for long-term engagement.
- Use Blackbaud Raiser's Edge NXT to maintain contact and other information for all prospects and major gift donors and enter contact reports into RENXT within 48 hours of all appointments.
- Attend and assist with cultivation and fundraising events (some evening and weekend work required).
- Stay informed on legislative and tax changes affecting major and planned gifts.

Coordinate with colleagues and participate in team and Basilica of Saint Mary staff meetings and activities.

- Maintain gift administration policies and reports in coordination with development, accounting and finance colleagues.
- Meet weekly with the Managing Director of Mission Advancement and provide a summary of donor and prospect initiatives.
- Participate in development team meetings, regular major gift meetings and 2-4 planning meetings/year and participate in all-staff meetings, gatherings and trainings.
- As an "exempt" employee, be ready to work and complete all assigned responsibilities and accept additional responsibilities identified by your supervisor.

Designation of Essential Functions

Employment in and by the Church is substantially different from secular employment.

Church employees/volunteers must conduct themselves in a manner which is consistent with and supportive of the mission and purpose of the Church. This position **does not** require that the employee/volunteer be a Catholic. However, as a parish community rooted in the teachings of the Catholic Church, employees/volunteers are expected to be knowledgeable of core tenets and respectful of the mission, purpose, and teachings of the Catholic faith.

Employee: I have reviewed this job description and agree it is an accurate representation of the responsibilities of my job. I understand that as an organization's needs change, my job description will change.

Signature of
Employee _____ Date _____

Supervisor: I have reviewed this job description and agree that it is an accurate representation of responsibilities performed in this job.

Signature of
Supervisor _____ Date _____