



DIRECTOR OF MAJOR GIFTS & PLANNED GIVING

May 26, 2026

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING



BACKGROUND

Through the financial support of donors across the United States, **Sacred Heart Southern Missions** (SHSM) staffs and funds the work of six social service offices providing emergency assistance (food, clothing and utilities), skill development, advocacy and counseling, as well as several specialized programs, for people living in poverty.

Two Catholic elementary schools provide a Christ-centered education to more than 400 children. Its Volunteer Program offers diverse, year-round opportunities, including home repair for the poor, elderly, and disabled, food distribution, holiday help and much more.

SHSM's Housing Program includes a 38-home low-income neighborhood, offering residents safe, affordable housing, adult continuing education classes, and a pathway to homeownership.

Mission

To be a witness to the all-inclusive love of God
Revealed in the Sacred Heart of Jesus
To be a voice of compassion for people in need
To be steadfast in our work for social justice

Position Summary:

This is a senior leadership role responsible for generating current and future income goals by educating donors to the benefits of planned giving possibilities to support the charitable purposes of Sacred Heart Southern Missions. The Director of Major Gifts & Planned Giving meets with donors and prospects to qualify, cultivate, solicit and steward planned and major gifts, working as part of a collaborative team across the Development department of the organization. Responsible for developing, implementing and administrating a comprehensive major gift and planned giving program, including supervision of department staff and activities. This is an Exempt-level salaried position.

Essential Functions:

- Achieve annual revenue goals for the income categories of Major Gifts, IRAs, Gift Annuities, DAFs, Bequests and Trusts.
- Achieve annual goals for donor contacts via direct mail, telephone, email and in person visits.
- Communicate with planned giving and major gift donors and prospects via mail, telephone, or person-to-person visitations to explain general benefits, concepts behind charitable gift planning, and available options.
- Respond to requests for information on planned giving options; prepare individual proposals and other paperwork associated with closing planned gifts.
- Identify individuals who meet the established criteria of donors and cultivate positive relationships. Coordinate all endeavors pertaining to soliciting, cultivating and servicing donors.
- Maintain donor confidentiality and document all contacts in CRM.
- Supervise the development of print and audio-visual materials about planned giving; devise and implement targeted mailings, articles, and presentations; use the organization's newsletter and other appropriate direct mail appeals. Create an action plan for Major Gift initiatives, including formulating a vision statement, outlining specific needs and tasks.
- Collaborate with third party providers for services related to executing core functions of marketing, servicing and securing major and planned gifts.
- Promote planned giving in a variety of forms to donor members. Schedule personal visitation by the SHSM Spiritual Advisor with special planned giving and major gift donors when appropriate.
- Comply with individual state requirements for all charitable planned giving; communicate with attorneys and estate administrators; facilitate legal paperwork; monitor status of estates and trusts; and project and track income.
- Manage and communicate legalities surrounding marketing, receiving and servicing of Planned Giving instruments.

- Prepare weekly, semi-annual, and annual reports on activities pertaining to the planned giving program.
- Coordinate and conduct private tours with visiting donors.
- Establish department goals; prepare and submit the planned giving budget for inclusion in the annual Sacred Heart Southern Missions budget.
- Manage department programs; supervise and train MG/PG department personnel.
- Stay up to date and maintain a close relationship with Programs of the SHSM.
- Perform other job-related duties as directed by the Executive Director/CEO.
- Supervisory Responsibilities: Directly supervise the staff of the Planned Giving Department and carry out supervisory responsibilities in accordance with the organization's policies and applicable laws.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, and/or abilities required.

Supervisory Skills: Must be able to supervise the staff of the Planned Giving Department and carry out supervisory responsibilities in accordance with the organization's policies and applicable laws.

Education and/or Experience: Minimum of a Bachelor's Degree and 10 years, hands-on experience with charitable fundraising, including five years of management experience. Experience in relating to a wide variety of people. Must possess knowledge of current office best practices, procedures, and equipment; knowledge of moves management and various planned giving vehicles; knowledge of laws, rules, and regulations related to charitable fund raising, including tax and legal aspects. Experience in the use of development and/or CRM software related to major gift and planned giving donations.

Language Skills: Ability to read, write, and interpret documents such as procedure manuals; ability to effectively present information in one-on-one as well as small and large group situations; ability to effectively communicate and present ideas to management and staff. The position requires strong interpersonal skills and a considerable amount of writing that assumes a good command of the English language, grammar, spelling, and punctuation. Word processing skills are necessary for the efficient execution of writing projects. Superior oral and written communication skills are required.

Mathematical Skills: Exceptional attention to details. Knowledge of general accounting practices required.

Reasoning Ability: Ability to carry out instructions furnished in written, oral, or diagram form and ability to creatively solve problems.

Other Skills and Abilities: Requires current knowledge of Intel-based computer workstations and applicable software programs, including Microsoft Office products. Ability to operate office

equipment; ability to prioritize workload and work independently; ability to proofread, must be detail oriented. Ability to supervise subordinates and operate in a team environment, maintaining effective working relationships with others. Effective public relations skills are required, as in addition to maintaining good relations with employees, this role has high exposure to visitors, the Board of Directors, and the public in general. Air and ground travel is required as necessary.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations will be made, whenever possible, to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit for extended periods of time; use hands to finger, handle, or feel objects, tools, or controls; use repetitive shoulder, wrist, and hand movements; to talk and to hear. The employee is required to stand, walk, reach with hands and arms, bend at the waist, stoop, kneel, crouch, or crawl. The employee may occasionally need to lift, push, and/or move up to 15 pounds.

BFOQ:

This position is a form of ministry to the SHSM and, as such, requires the incumbent to be a practicing Catholic and have thorough knowledge of the Catholic faith and practices.

Travel: 20-25% (10-12 trips of 3-4 days to meet with donors, nationally)

Salary: Commensurate with background and experience. Comprehensive benefit program (details will be furnished to finalist candidates).

Application Deadline: July 31, 2026

(We reserve the right to shorten the deadline for applications if we have sufficient interest. Please apply early to ensure your background will be considered.)

For consideration, please email resume to:

Ken Rowe

Vice President CAO

Catholic Recruiter Associates

Kenr@CatholicRecruiter.com

Note: Only those selected for an interview with the search committee will be contacted.

This position serves a vital religious function that supports the mission and beliefs of the Roman Catholic Church.

Search managed by:

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING

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