

# **DIOCESE OF BISMARCK**

## **Vacant**

**Job title:** Planned Giving Specialist  
**Status:** Exempt  
**Department:** Office of Mission Advancement  
**Reports to:** Moderator of the Curia

### **Job Summary**

The Diocese of Bismarck is seeking a well-qualified and highly motivated individual to fill the position of Planned Giving Specialist. The ideal candidate would possess the following attributes:

- A proven fundraising track record, as well as possible history in finance, sales, and marketing
- The ability to lead, work in a team setting, and work independently
- Knowledge of planned giving and its complexities: estate planning, tax laws, wills, trusts, etc.
- Comfort in researching and analyzing large groups of data to uncover planned giving prospects
- Excellent verbal and written communication aptitude
- Capable of handling numerous tasks at once and still meeting deadlines
- Some knowledge of trust/annuity work preferred

\*Due to the sensitive nature of the information encountered on a daily basis in the position ABSOLUTE CONFIDENTIALITY IS REQUIRED.

### **Essential Functions**

- Offer educational opportunities and materials regarding planned giving for fellow staff and prospects/donors
- Management of a branded planned giving program; proficiency in Crescendo and Raiser's Edge or similar
- Manage full portfolio of donor clients before, during and after giving process
- Experience with, or ability necessary to be trained in basic trust law and initiation of charitable trusts
- Provide donors with counsel and support throughout the stewardship process
- Serve donors who have announced a commitment to planned giving
- Cultivate a sense of stewardship in those who are open but uninformed about planned giving
- Helps write marketing materials and communications for the planned giving program
- Participate in goal setting and present necessary updates to the board and other organizational leaders

### **Job Requirements and Qualifications**

The candidate should possess the following minimum requirements in applying for the position:

- A Bachelor's Degree, preferably with a focus in business administration, marketing, finance or sales AND 3+ years of work experience with a proven track record in meeting and setting goals, customer service and success working independently and within a larger team setting

- Or 5+ years of experience in a position directly related to or involved with planned giving and/or estate planning with a proven track record in meeting and setting goals, customer service and success working independently and within a larger team setting.
- OR 7+ years in a managerial/leadership role focused on customer relations and service with a history in finance, sales, and marketing with a proven track record in meeting and setting goals, customer service and success working independently and within a larger team setting.

**Knowledge, Training or Skills: (licenses, programs, or certificates):**

- Proficient in Office Suite – Word, Outlook and Excel. Ability to learn PowerPoint and other Office Suite programs
- Familiarity with Raiser’s Edge or similar database programs
- Familiarity with or ability necessary to be trained in the use of Crescendo Interactive
- Excellent interpersonal, communication and writing skills
- Excellent organizational skills with ability to demonstrate creative thinking suggesting positive change and improvements of processes and procedures
- Detail-oriented and effective time manager, with the ability to prioritize and multitask
- Knowledge of the work of a Catholic diocese is preferred
- Knowledge of diocesan policies, programs, diocesan clergy and parishes preferred
- Portray a positive, professional attitude and be a self-starter highly skilled in organizational, interpersonal, oral and written communication skills and proper telephone/email etiquette
- Ability to work well with others, work independently with minimal supervision and be observant of the confidentiality of the position
- Supervisory experience preferred
- Knowledge and understanding of the Catholic Church and its mission required. Ability to project a faith-filled presence required
- Occasional evening and weekend work, one to two overnight travel requirements per year

**Resume Submission and Other Requirements**

Compensation will be competitive, includes a benefits package and will be commensurate with experience of candidate. State-wide travel and some limited national travel is required. A valid US driver’s license is required. All offers of employment are pending a background check and reference check.

Interested parties should send a completed application, resume and contact info for three professional references to:

Denise Jordan at [djordan@bismarckdiocese.com](mailto:djordan@bismarckdiocese.com)

Or by mail to:  
Denise Jordan  
Diocese of Bismarck  
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