



Executive Search
Chief Philanthropy Officer
Garden Grove, CA – Hybrid

Position Overview

Sterling Search Inc. has been exclusively retained to recruit for the new **Chief Philanthropy Officer** for **The Orange Catholic Foundation (OCF)**.

The Foundation

The Orange Catholic Foundation serves the Diocese of Orange County through philanthropy and stewarding funds to protect and support ministries which further its beliefs and values in loving service to God. The Foundation's vision is: *Relying on the Holy Spirit, the Orange Catholic Foundation is the vibrant center of philanthropy for the Roman Catholic community of Orange County, helping to sustain and enhance the faith life of all those it serves.*

OCF is an independent 501(c)(3) charitable corporation that was formed in Orange County to serve the Catholic community. The Foundation helps support individuals, families, corporations, and family foundations with their charitable giving. OCF plans and conducts major fundraising programs and events, including the annual Conference on Business & Ethics, Educational Seminars and other special fundraising events. The Foundation manages endowments and other charitable long-term funds, providing grants, always following donor intent, in support of Orange County's Catholic community.

The Opportunity

Under the leadership of Executive Director Steve Cameron, and Executive Vice President Kathleen Hurtt, OCF is redefining the future of philanthropy for the Catholic community of Orange County. At OCF's 22nd Annual Conference on Business & Ethics in March 2025, a bold new vision was unveiled —one rooted in the unprecedented intergenerational transfer of wealth currently reshaping the global financial landscape.

Cameron emphasized that this historic shift is funneling assets into three primary channels: taxes, heirs, and nonprofit organizations. Catholics aged 55 and older in Orange County collectively hold an estimated \$400 billion in net worth—an astonishing 97% of which is tied up in appreciated assets such as real estate and stocks.

Recognizing the immense potential this wealth represents, OCF has, over the past year, built a robust network of trusted financial professionals—including estate planning attorneys, CPAs, and financial advisors. This coalition is dedicated to identifying the most tax-efficient strategies to help individuals transfer their wealth—either to the next generation or to the Church—while maximizing impact and minimizing tax burdens.

This call to action was clear: the Church must position itself at the heart of this transfer of wealth and not sit by on the sidelines. By leveraging strategic, tax-efficient philanthropic vehicles, Catholics can ensure their legacy supports the ministries and missions they hold dear. These tools unlock the full potential of appreciated assets within the Orange County Catholic community, amplifying each donor's impact.

This pioneering model is also attracting attention across the region, as neighboring Catholic institutions engage OCF for insight into their philanthropic strategies. The surge in interest is fueling dialogue around the replicability of OCF's approach—laying the groundwork for a thoughtful expansion beyond Orange County.

The new Chief Philanthropic Officer will be a seasoned and accomplished fundraising executive, with a proven track record of developing high-performing philanthropic teams. They will bring deep expertise in building traditional annual giving programs and campaigns, as well as securing complex, transformative gifts and navigating sophisticated donor landscapes.

The Chief Philanthropic Officer will be joining OCF at a pivotal moment—becoming part of a team that is strategically investing in a bold and transformative vision. While foundational work has begun to establish the necessary infrastructure, there remains significant opportunity to shape and build key systems, implement best practices, and drive operational excellence. Beyond execution, this role offers a unique chance to build and train a high-performing fundraising team.

The Chief Philanthropic Officer will also help define the direction of this pioneering philanthropic foundation, and contribute meaningfully to its ethos, strategy, and long-term impact. The Chief Philanthropic Officer will be one driven by an ambitious goal to help shape a \$1 billion asset-based institution. The compensation package is designed to scale meaningfully in alignment with the organization's and Chief Philanthropic Officer's growth thereby expanding the abundance of philanthropic gifts that directly bless Catholic schools, enrich parish life, honor retired priests, and uplift vital ministries.

Position Description

Summary/Objective

The Orange Catholic Foundation seeks a senior fundraising staff member who will lead OCF's overall philanthropy efforts through comprehensive planning, implementation, staffing, management and oversight of all philanthropic work including, annual giving and campaigns as well as identifying, qualifying, cultivating, soliciting, stewarding and growing donors capable of making transformational gifts that benefit the Diocese, Parishes, Schools and Ministries in the Diocese of Orange. The Chief Philanthropy Officer will be well versed and experienced in building strong relationships, visionary in philanthropic strategies that add value and are cutting-edge while implementing best practices and trends in philanthropy. This leader will be responsible for building a robust philanthropic program with a special focus on securing appreciated assets. They will be responsible for establishing goals and metrics to evaluate implementation of strategy, tactics and the overall effectiveness of the philanthropy program; developing and assessing the team to ensure that the department/function is effectively structured and staffed; and overseeing performance measures and monitoring results. Given the nature of this work, it is imperative that this leader be an active, practicing Catholic.

Essential Function

- Foster a culture of philanthropy and ensure that fundraising efforts are executed in alignment with the organization's values, vision and mission.
- Partner with the Executive Director, Executive Vice President, Board and staff to facilitate short- and long-term strategic plans to meet annual philanthropic goals and advance organizational priorities.
 - Serve as key liaison to the Board's Philanthropy and Strategic Plan Implementation Committee.
 - Manage a team instilling regular metrics and goals for currently four fundraising professionals, with a plan to grow this team to 14.
- Identify opportunities for increased giving capacity and develop multi-faceted solicitation plans for existing donors and new prospects.
- Identify philanthropic interests of both current major donors and prospects using *Moves Management* strategies to provide donors with an outstanding experience of their time, advocacy, and financial support.
- Identify, cultivate, and solicit a diverse base of high-net-worth individual donors with the capacity to make six-figure donations or more.
 - Serve as the key portfolio coordinator and maintain a personal portfolio of 75 donor prospects.
 - Lead the creation and execution of content for proposals, solicitation letters, and donor correspondence.
 - Lead the development and implementation of a stewardship program aimed at cultivating deeper ties with donors.

- Develop strategies to engage and educate donors about the financial advantages of donating non-cash assets, particularly real estate, stock and QCD from IRA's.
- Serve as the chief relationship person representing OCF to both internal and external constituencies.
- Track and report regular progress against strategic goals, including donor engagement and stewardship touch points, revenue and pipeline management details.
- Maintain a working knowledge of best practices and significant developments and trends in philanthropy and adapt fundraising strategies, as necessary.
- Prepare and manage an annual philanthropy budget.
- Other duties and responsibilities as assigned; assist with day-to-day needs of the Foundation.

Supervisory Responsibility

This position will manage the Philanthropy Officers, Director of Philanthropy Services and a Philanthropy Assistant.

Education/Experience/Skills

- Active, practicing faith-filled Catholic with a strong understanding of Catholic Church teachings, traditions, procedures and organizational structures.
- Bachelor's degree required. Master's degree and/or fundraising certificate preferred.
- 10+ years of professional fundraising experience in a nonprofit organization and minimum of 5 years staff management experience, and preferred experience working in collaboration with a Board of Directors.
- Donor centric vision.
- Self-starter with high standards.
- Strong leadership and management skills and a demonstrated track record of business management and operations leadership, implementing development processes and systems to measure activity and accountability.
- Ability to work both independently without close oversight, but also a team player who will productively engage others at varying levels of seniority within and outside the Foundation.
- A strategic approach to development, with a track record of cultivating and managing major gift and annual fund donors.
- Knowledge of volunteer management and Catholic Church infrastructure.
- A track record as an effective communicator skilled at writing and speaking; adept at writing proposals, solicitation letters, donor correspondence, and other types of materials to enhance fundraising.
- A creative thinker with the ability to develop strategies into action plans.
- Connected to, and aware of, high-net-worth Catholics.
- Computer skills preferred include MS Word, Excel, PowerPoint and Outlook.
- CRM experience with Raiser's Edge preferred but not required.

- The ability to be flexible in a complex and changing business environment.
- Significant experience and a demonstrated track record of soliciting and closing gifts of appreciated assets.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Compensation:

- Salary range of \$165,000 to \$185,000 plus bonus with a competitive benefits package will be offered to attract an outstanding candidate.

Please send resumes to:
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TO APPLY:
www.sterlingsearchinc.com

Direct all correspondence, emails and telephone calls to Sterling Search.
Any resumes sent or telephone calls made to OCF will be redirected to Sterling Search.