



**We're looking for a  
PHILANTHROPY OFFICER, LEGACY GIVING  
(20-month Maternity Leave Contract starting December 1, 2024 or earlier)  
Salary Range \$63,000-\$80,000**

**We are...**

- A dynamic fundraising organization committed to raising funds and awareness to enhance health and wellness in our community.
- A passionate team of staff and volunteers that have worked together to raise more than \$250 million in the 36-year history of the Foundation.
- An organization that is preparing for our next stage of growth and the launch of our next campaign project.

**The Philanthropy Officer, Legacy Giving...**

- This position will be ideal for someone with high energy, a flexible schedule, and the ability to juggle a variety of tasks and deadlines and not break a sweat.
- We are a small but mighty team, and this position is ideal to grow your fundraising career.
- If you are donor-centered with excellent stewardship skills and a passion for fundraising, we want to hear from you!

*Applicants should send a resume and cover letter by **October 18, 2024**, via email to Hiring Manager at [hr@pahfoundation.ca](mailto:hr@pahfoundation.ca). We thank all applicants for their interest, however only those being interviewed will be contacted.*

*Diversity is a core value at Peace Arch Hospital Foundation, and we are committed to building and sustaining an inclusive and equitable working environment for all staff. Should you require accommodation, please contact us.*

*We respectfully acknowledge the history, language, and culture of the Semiahmoo First Nation whose unceded and traditional homeland we conduct our work on.*

## **Job Profile**

### **PHILANTHROPY OFFICER – LEGACY GIVING**

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#### **Summary of Role:**

- Responsible for the management of a portfolio of Legacy donors
- Raising funds by employing cultivation, solicitation and stewardship strategies
- Meets regularly with local lawyers, notaries and wealth advisors to increase knowledge and understanding of Legacy Giving to the Foundation
- Is committed to a donor-centered approach in all activities and ensures a high standard of service to our donors

#### **Reports to:**

- Director, Philanthropy

#### **Direct Reports:**

- None

### **RESPONSIBILITIES**

#### **Legacy Giving Program:**

- Manages and plans all activities within the Legacy Giving Program
- Develops short and long-term goals and objectives for ongoing identification and cultivation of legacy giving prospects
- Develops appropriate solicitation strategies and approaches using relationship/moves management techniques, utilizing our CRM as required
- Prepares proposals for donors as required
- Performs ongoing analysis of the results of solicitation efforts and other legacy giving activities such as cultivation, stewardship and expectancies
- Works proactively with local retirement communities and key volunteers to deliver regular “Speakers Bureau” presentations
- Looks for opportunities in the community, including events and key partnerships, to increase awareness and participation of legacy and planned giving options
- Manages all aspects of the Amy Weatherby Circle including donor recognition and stewardship, communication and marketing activities
  - Leads the *Weatherby Circle Luncheon*, and *Strawberry Social* event in conjunction with the events team

- Works closely with Marketing Dept on LG promotion and awareness activities, including our participation in Will Power program
- Develops legacy giving policies and guidelines on gift acceptance and provides expert advice as required
- Employs and continually deepens understanding of a variety of planned gift options for donors to consider including: bequest, life insurance, RRSPs, RRIFs, and more

### **Professional Advisors**

- Designs and executes annual Partners in Planning program to our local professional advisor community, with a focus on engaging new advisors every year
- Assists in developing and conducting presentations on estate tax, financial planning and existing gift vehicles to potential donors, professional advisors and other interested groups
- Meets regularly, on a one-on-one basis with local lawyers, notaries and wealth advisors to provide key information and create strong, long-term relationships
- Develops, plans and executes a robust, professional advisor strategy to increase engagement and participation

### **Legacy Giving - Estate and Bequest Administration:**

- Responsible for the management of estate administration: review notices and enter information in the database, review open estate files to determine status, follow up with Estate executors and solicitors
- Work with the Finance department to oversee the timely processing of releases and other estate documentation as needed
- Engage and liaise with professional advisors for counsel to help resolve complicated or contested estate files as necessary
- Work in conjunction with the Executive Director and the Finance department to ensure estate files are moving forward appropriately
- Provide timely support for all aspects of the program to internal and external stakeholders
- Work in conjunction with other PAHF departments to ensure gift designation and recognition are met, on an as-needed basis
- Record all transactions and update all daily incoming correspondence in the database and act as the point person for key reports relating to the Legacy Program
- Maintain current and precise database information to ensure accurate revenue tracking, giving trends and analysis
- Develop, monitor and provide historical data, metrics and analysis to assist in forecasting

- Manage regular reports as required and share on an as-needed basis

### **EDUCATION AND EXPERIENCE**

- Diploma or degree or designation in fundraising, not-for-profit management, marketing and communications or an equivalent combination of education and experience
- 5+ years direct and progressive fundraising experience; with at least 3+ years' experience working at the management level on major gifts, legacy giving, sponsorship, and/or corporate giving
- Demonstrated legacy giving experience is an asset
- Participation in a capital campaign is an asset

### **KNOWLEDGE, SKILLS AND ABILITIES**

- Sound knowledge of fundraising principles
- Exceptional interpersonal skills including good judgement, diplomacy, sensitivity and tact
- Ability to collaborate and work effectively as part of a team
- Demonstrated initiative and follow through
- Comfortable making cold calls
- Ability to work evenings and weekends as required
- Proven success in building and maintaining donor and volunteer relationships
- Proven ability to work successfully with senior donors and volunteers
- Demonstrated ability to engage a wide variety of stakeholders
- Strong ability to analyze, plan, initiate and complete projects in a timely manner
- Proven business development abilities and results orientated
- Strong attention to detail and excellent multi-tasking and time management skills
- Exceptional written and oral communication skills
- Proficient using Microsoft Office Suite
- Working knowledge of fundraising databases a definite asset
- Understanding of issues facing healthcare and fundraising