



**Manager – Planned Giving
Full time Permanent (38.75 hours/week)**

Calgary Health Foundation is a philanthropic organization established in 1996 to unite donors, hospitals, health care providers and community partners with the ambitious aim of revolutionizing health outcomes. Together, we continue to transform lives by establishing extraordinary health programs — early stroke intervention, a world class urology clinic and brain institute, precision neonatal care and advanced trauma centres. Through collaboration, unrelenting persistence and a sharp focus on care, wellness and research, we are unyielding in our efforts to ensure Calgarians receive the most progressive health care in the world — because our loved ones and yours deserve nothing less.

THE ROLE

Reporting to the Director, Strategic Giving, and in close collaboration with the Philanthropy team, the Planned Giving Officer works to build, manage and grow a portfolio of donors committed to planned giving. This role is focused on connecting donors with the resources and information they need to make a legacy contribution to support health care, research and wellness through Calgary Health Foundation. Working with a wide range of internal and external stakeholders, this is a dynamic role that will contribute significantly to the long-term success and sustainability of the organization.

KEY RESPONSIBILITIES

- Manage a portfolio of up to 250 planned giving donors who have made a commitment to make a bequest gift to Calgary Health Foundation, actively stewarding these donors and communicating to them the importance of their legacy contribution.
- Build trust and rapport with donors and prospects who are considering or interested in making a legacy gift, cultivating and soliciting gifts as the timing is right for each donor.
- Identify and cultivate a network of professional contacts in industries related to planned giving (Accountants, Wealth Managers, Lawyers, Financial Planners, and others), building the profile of Calgary Health Foundation as a place for clients to leave an impactful legacy gift.
- Participate actively in discussions with the Philanthropy team on prospect clearance and portfolio management, to ensure a high level of coordination between planned giving and major gift activities.
- Work collaboratively with the Director, Strategic Giving and other stakeholders to ensure that planned giving is and continues to be an organizational priority that is

considered in the development of direct marketing campaigns, digital properties, and other collateral.

- Work closely with the Controller and Finance team to develop and execute gift agreements that are in line with the policies and processes of the organization.
- Work closely with estate executors and internal stakeholders to ensure that bequests are processed and received by the organization in a timely manner.
- Build knowledge and expertise around non-cash financial instruments that can be used to amplify giving, such as life insurance, annuities, stocks, real estate, and others, promoting these giving options to donors and team members.
- Other duties as assigned.

EXPERIENCE, SKILLS AND QUALIFICATIONS

- A minimum of 5 years of progressive fundraising experience, with at least two years of experience in planned giving
- A bachelor's degree, or equivalent combination of experience and education in a related field
- CFRE designation is an asset
- Previous experience working with Raiser's Edge or similar is required
- Prior knowledge of estate planning, including wills, trusts and estates and gift-tax laws
- Knowledge about benefits of giving through securities, life-insurance, charitable-remainder trusts, endowments, RRSPs, and other financial instruments will be a strong asset
- Strong written and verbal communication skills
- Ability to prepare effective proposals and presentations to prospective donors
- Some level of mass-marketing knowledge is a preferred but not required
- Strong customer service skills and ability to prioritize donor needs
- A motivated self-starter who can work independently, and as part of a larger team
- A strong relationship builder with excellent interpersonal skills; poised and professional
- Brings new ideas and creativity, along with best practices and innovative approaches for donor engagement and stewardship
- Acceptance of the mission and principles of the Donor Bill of Rights and Ethical Standards as outlined in professional fundraising practice (AFP)
- Proven ability to set priorities, complete work with minimal supervision and meet deadlines
- Strong focus on accountability

WORKING CONDITIONS

- Primarily sedentary office work with long periods of time at a computer
 - Occasional travel to various sites around Calgary may be required (i.e. hospitals, events)
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APPLICATION INFORMATION

Salary Range: \$81,000 - \$121,000 per year

Please note that all Calgary Health Foundation employees are required to provide proof of full COVID-19 immunization upon hire as a condition of employment.

We thank all applicants for their interest in this role and Calgary Health Foundation; please note that we will only be contacting candidates selected for an interview.

To explore this opportunity further, please send your resume and cover letter, in confidence, no later than July 29, 2022 to:

Rosaline Akinokun
Manager, People Services
rosaline.akinokun@calgaryhealthfoundation.ca