Job Description

Job Title:	(Senior) Development Officer, Planned Giving
Department:	Office of Advancement
Reports To:	Director, Annual and Planned Giving
Jobs Reporting:	None
Salary Grade:	USG 9-11
Effective Date:	April 2022

Primary Purpose

Accountable to the Director, Annual and Planned Giving for individual planned giving fundraising across all faculties, schools and academic support units. Primary responsibilities include prospect identification, cultivation, solicitation and stewardship of planned giving donors.

The (Senior) Development Officer, Planned Giving will report to the Director, Annual and Planned Giving. The Director will provide direction in establishing and clarifying priorities for the Planned Giving program and will oversee the incumbent's development and performance as a fundraising professional.

Planned Giving works closely with Annual Giving, Leadership Giving, Donor Relations and Stewardship, and others in the Office of Advancement to coordinate and support planned giving fundraising activities.

The (Senior) Development Officer, Planned Giving serves as a liaison for planned giving across the faculties, schools, academic support units, federated university and affiliated colleges, and Office of Advancement, keeping each area appraised of plans and activities. The incumbent will also function as a planned giving resource for Advancement.

Key Accountabilities

Portfolio Management

- Develops and implements planned giving strategies with an emphasis on identifying, cultivating and soliciting gifts. Manages a portfolio of planned giving prospects: identifying, developing, and implementing tailored action plans and solicitation strategies for each prospect.
- Depending on circumstances, solicits prospects individually or orchestrates solicitation with volunteers and/or senior administration and other development officers as/when appropriate.
- Provides estate planning, tax and charitable giving information to prospective donors. Prepares and presents written proposals and financial illustrations of proposed gifts to raise planned gifts. Drafts and submits meeting notes for prospect tracking.
- Meets and consults with prospective donors about planned gifts. Drafts terms and conditions for endowments, scholarships, awards, and bursaries in accordance with established templates.
- In consultation with the Director, Annual and Planned Giving, assesses program needs, and contributes to the development and implementation of plans to build the planned giving pipeline.
- Provides a timely, thoughtful and professional response to all inquiries received by phone, mail and email, along with responses from surveys and appeals. Develops a follow-up plan and implements relationship management strategies for both prospects and donors.

Memorial and Tribute Gifts

- Administers and guides inquiries about memorial and tribute gifts on campus through to completion.
- Coordinates with Plant Operations for all memorial and tribute tree and bench installations.
- Follows guidelines in place to ensure consistency and enhancement of the campus landscape.
- Meets and consults with prospective donors about memorial and tribute gifts.

Marketing

- Assists in the planning and preparation of planned giving articles, stories, and ads for institutional and external publications.
- Assists in creating and updating planned giving communications and materials e.g. appeals, surveys, event invitations, cards, brochures, info sheets, etc.

Estate and Life Insurance Policy Administration

- Oversees the administration and stewardship of estates.
- Oversees the administration and stewardship of life insurance policies.

Laurel Society Stewardship and Recognition

- Manages the Laurel Society recognition program for planned gift donors.
- Plans and executes stewardship activities for planned gift donors e.g. events, communications, etc.

Collaboration and Coordination

- With direction, works closely with the University's finance office, program administrators, attorneys, executors and estate solicitors to ensure timely administration of various types of gifts.
- Develops effective working relationships with other planned giving officer and development officers across campus.
- Provides technical and other assistance to development officers regarding planned giving strategies as required.
- Keeps informed about the tax aspects of charitable gifts, and new legislation and revenue rulings affecting such gifts. Makes information available to the Office of Advancement team and others including donors and volunteers as appropriate.

Other

- Coordinates special projects and campaigns.
- Helps to raise philanthropic awareness and promotes a culture of philanthropy on campus.
- Other duties as assigned.

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess, and correct health and safety hazards, as required.*

Required Qualifications

Education

- Completion of a Bachelor's degree, or equivalent combination of education and experience is required
- CAGP Gift Planning Fundamentals Course is an asset
- CAGP Original Canadian Gift Planning Course is an asset
- CFRE certification is an asset

Experience

- 3-5+ years of progressively responsible fundraising experience including direct solicitations
- Experience in gift planning, law, financial planning or accounting, and a clear knowledge and understanding of the Canadian tax system, estate planning and various planned giving vehicles is an asset

Knowledge/Skills/Abilities

- Demonstrated planning, analytical, and organizational skills
- Excellent interpersonal and communication skills, both oral and written
- Sound judgement, tact, diplomacy, and problem-solving ability
- A working knowledge of the university environment
- Demonstrated ability to create promotional materials and proposals
- Proficiency with The Raiser's Edge, Blackbaud CRM, and iModules Encompass

Nature and Scope

- **Contacts: Significant Internal Relationships:** Vice President, Advancement; Associate Vice President, Development and Advancement Strategy; Associate Vice President, Advancement Services; Director, Annual and Planned Giving; Annual Giving; Leadership Giving; Donor Relations and Stewardship; Senior administrators (e.g. President; Provost; Deans; Directors); Directors and Associate Directors of Advancement; Development Officers; Office of Advancement; Plant Operations; Creative Services; Student Awards and Financial Aid (SAFA); Graduate Studies and Postdoctoral Affairs (GSPA); Federated University and Affiliated Colleges **Significant External Relationships:** Prospects and donors for qualification, cultivation, solicitation, and stewardship purposes; University of Waterloo alumni, faculty, staff, retirees, parents, and friends; volunteers; allied professionals (estate lawyers, accountants, and financial planners); CAGP National and CAGP Waterloo-Wellington Chapter
- **Level of Responsibility:** Responsible and accountable to the Director, Annual and Planned Giving for planning, implementation, development and evaluation/reporting of select Planned Giving programs.
- **Decision-Making Authority:** Assists with overall program budget management; priority setting within larger program goals; handling of sensitive donor issues with sound judgement.
- **Physical and Sensory Demands**: Minimal demands typical of an administrative position operating within an office environment. Minimal physical demands typical of an office environment and the demands related to occasional travel on and off campus.
- **Working Environment:** Minimal exposure to disagreeable conditions; deadline pressures with demand for thoroughness and accuracy typical of program administration responsibilities. Some evening and weekend hours. Some travel required.