



Manager, Legacy Giving

Position Type: Full-Time, Permanent

Application Deadline: March 4, 2025

About Richmond Hospital Foundation

Our mission at Richmond Hospital Foundation is to serve as a catalyst for donors to achieve their aspirational philanthropic goals while helping us drive positive, transformational change for local health care in Richmond. Inspiring joyful giving is at the core of all we do. It is also integral to our fundraising (a lifetime of giving) and our goal of building strong, trust-based relationships with our valued donors, clearly demonstrating the impact of their philanthropy.

What We Offer

- Competitive hiring salary range between **\$70,000 to \$80,000** per annum
- Comprehensive **benefits package**, including:
 - Group Life Insurance, Long-Term Disability, Dental, Extended Health Care
 - MSP Coverage, Municipal Pension Plan eligibility
 - 20 vacation days per year
 - Wellness Program
- **Hybrid work model**

If you're passionate about integrity, teamwork, and making a difference, Richmond Hospital Foundation welcomes you.

The Opportunity

We are hiring a Manager, Legacy Giving to play a key role in growing and shaping the Legacy Giving program at Richmond Hospital Foundation. This is an exciting opportunity to inspire and engage a dedicated donor community in supporting Richmond's health care future through legacy gifts.

The Manager, Legacy Giving will advance the program's growth and success by increasing the number of confirmed legacy donors and generating revenue from legacy gifts. This role involves developing and implementing annual work plans, initiating donor engagement strategies, and building relationships with professional advisors to cultivate a strong pipeline of legacy giving donors and prospects.

The ideal candidate will be a detail-oriented, results-driven fundraiser with proven experience in legacy giving. They will excel at fostering meaningful relationships and identifying opportunities to inspire joyful giving that makes a lasting impact on Richmond's health care. The Manager will

also oversee the coordination of daily operations for legacy initiatives, ensuring seamless execution and alignment with organizational goals.

Key Areas of Responsibility:

Strategy Development & Management:

- Assists the Associate Director, Legacy Giving to develop and execute legacy giving strategies aligned with organizational goals.
- Executes annual work plans.
- Prepares reports, proposals, and presentations as required.

Donor & Prospect Management:

- Analyzes, segments, and prioritizes legacy giving prospects for each initiative.
- Identifies, qualifies, cultivates, solicits, and helps steward legacy gift prospects through moves management.
- Builds and fosters relationships with donors and prospects through meaningful face-to-face meetings, phone calls, emails, and events with donor-centric and culturally sensitive approaches.
- Contributes to engagement and cultivation initiatives to convert legacy giving prospects to confirmed planned giving donors.
- Provides timely, thoughtful, and professional responses to donor's legacy giving related inquiries.
- Develops programs and tools to engage professional advisors, including estate planners, lawyers, chartered accountants, and financial advisors, to inspire them to support Richmond health care through their expertise and collaboration.
- Attends or presents at donors and prospects events as a representative of the Foundation.
- Attends, volunteers, and participates in all Foundation events as required.

Program Coordination & Administration:

- Coordinates and implements the day-to-day operations of the legacy giving program, ensuring timely and efficient execution of activities.
- Implements prospecting initiatives such as donor survey, which requires querying donor lists from the database, mail-merging letters, sending survey packages to donors via email and mail, tracking actions in Raiser's Edge and following up with donors.
- Maintains accurate and up-to-date donor records in raisers-edge, including documentation of legacy gift intentions, and follow-ups.

Team Collaboration:

- Collaborates with Donor Relations to plan, coordinate and implement legacy giving seminars and cultivation events for donors, prospects, and professional advisors, to achieve the respective objectives.
- Analyzes and prioritizes legacy giving prospects, using data to develop stewardship strategies and recognize planned giving donors.
- Assists in developing strategies for ongoing stewardship and recognition of planned giving donors through effective data analysis.

Knowledge about philanthropy fundraising, gift planning vehicles, Canadian tax laws:

- Maintains current and deep understanding of gift-planning vehicles, including bequests, gifts of securities, life insurance, real estate, and registered savings plans (e.g., RRSPs, RRIFs, and TFSAs).
- Stays current on planned giving trends, best practices, changing legislation, and tax implications of major and legacy giving.

Qualifications & Experience

- University degree or diploma
- Minimum 5 years of progressive experience in fundraising, with demonstrated success in annual, major and/or legacy giving.
- Knowledge of Canadian legacy fundraising best practices, compliance, and tax implications.
- Proven relationship-building skills with an authentic and engaging approach.
- Demonstrated success in prospecting, cultivating, soliciting, and stewarding legacy gifts.
- Strong understanding of local multicultural communities, including Chinese communities (Hong Kong, Mainland, and Taiwanese Canadians).
- Proven ability to work collaboratively across teams and manage confidential and sensitive matters with integrity.
- Proven ability to exercise diplomacy, good judgment, and discretion in dealing with confidential & sensitive matters.
- Experience with data management and donor databases, including Raiser's Edge.

Skills & Abilities

- Exceptional storytelling and communication skills (written, verbal, and active listening), adaptable to diverse audiences.
- Strong relationship-building skills with an authentic, donor-centered approach.

- Highly organized, with the ability to plan and manage multiple projects to meet deadlines and desired outcomes.
- Life-long learner who remains current in fundraising and strategies.
- Proficient in Microsoft Office suite and donor management systems, including Raiser's Edge.
- Collaborative team player with the ability to work independently when needed.
- Fluency in English is required; proficiency in Cantonese and/or Mandarin is an asset.
- Flexibility to work evenings and weekends as required.
- Valid driver's license and access to a vehicle.

Successful applicants may be required to complete a Criminal Records Review Check.

How to Apply

If you would like to be part of this dynamic organization and have the expertise, education and experience outlined above and are interested in a full-time position, please submit your cover letter, and resume in a single PDF with "**Your Full Name, Manager, Legacy Giving**" by **March 4, 2025**.

Apply here: <https://summitsearchgroup.com/job/manager-legacy-giving-richmond-bc-ab1004/> or email it directly to Alexandra.Bunardzic@summitsearchgroup.com. Please note only qualified individuals will be contacted.

We truly appreciate all applicants for their interest and will contact those being considered for the position.

Richmond Hospital Foundation