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Job Title

Senior Gift Planning Officer

Salary Grade

009

A Brief Overview

As a senior fundraising professional reporting to the Director, Gift Planning, with accountability to the Department of Development, the Senior Gift Planning Officer is responsible for identifying, evaluating, cultivating, soliciting, and stewarding a diverse portfolio of donor relationships, with a focus on formulating and implementing strategies to maximize planned gift fundraising activities.

This position identifies, evaluates, cultivates, and canvasses appropriate prospective donors for in-life and estate donations. This position advises donors and professional advisors of donation vehicles and the implications of each. This position also develops fundraising strategies, executes plans, and negotiates as required to meet identified objectives.

The schedule for this position requires the incumbent to work variable hours on a regular basis, including evenings and weekends. In addition, travel is an inherent part of the position. This position is subject to the Averaging and Travel Time Credit provisions of the USW Local 2010 Collective Agreement.

What you will do

- Identifies, evaluates, cultivates, and canvasses appropriate prospective donors for in-life and estate donations.
- Provides faculty-based gift planning expertise, and oversees initiatives to solicit prospective donors.
- Advises donors and professional advisors of donation vehicles.
- Develops fundraising strategies, executes plans, and negotiates as required to meet identified objectives.
- Act as a liaison between the department, donors, volunteers, and professional advisors.
- Stewards individual confirmed planned gift donors, and assists with marketing and communications projects for this group.
- Manages special projects related to planned giving.
- Other duties as required in support of the department and/or unit.

Required Education

- Four-Year Bachelor Degree or equivalent. In addition, requires trade certification, qualification, or on-going learning to remain ahead of changes in technology or emerging fields.

Required Experience

- More than 5 years of experience.
 - Experience developing and/or implementing fundraising and/or major gift plans considered an asset.
 - Experience in writing, interviewing, reviewing, editing and/or proofreading internal and/or external communications and documents considered an asset (e.g., social media, policy manuals, newsletters, handbooks, legal documents, forms/templates, blogs, training/reference materials, technical documents, webinars, etc.).
 - Experience working at a post-secondary education institution considered an asset.
 - Experience working in a comparable client-focused environment considered an asset
 - Experience working in a non-profit office considered an asset.
 - Experience working with diverse populations/equity deserving groups considered an asset.
 - Knowledge of relationship building, fundraising and stewardship considered an asset.
 - Knowledge of relevant laws, regulations, policies, standards and/or guidelines considered an asset.
 - Previous experience building relationships with donors considered an asset.

Required Licenses and Certifications

- A CFRE (Certified Fund Raising Executive) certification considered an asset.
- G Driver's Licence required.
- Valid Passport with no travel restrictions is required.

Consideration may be given to an equivalent combination of education and experience.

Job Knowledge and Requirements

- Knowledge of concepts and principles in a specialist field that is typically acquired through a combination of advanced professional or academic qualifications and/or significant work experience.
- Provide expert advice, guidance and consultation on highly complex issues and/or where the outcome may be contentious.
- Interaction with others requires highly developed interpersonal skills to effectively persuade, negotiate, counsel, and/or consult.
- Adapt messages to meet the different needs of different audiences.
- Prioritize and distribute work to deliver objectives on time and to the highest standard.
- Identify in advance when the intended results may not be achieved and develops a plan to address the gaps.

- Lead team and project meetings and develop team/unit and departmental project plans.
- Lead procedural or technological change within a unit or across broader university functions.
- Identify opportunities to improve the effectiveness and efficiency of work processes.
- Anticipate complex challenges to ensure activities are completed on time.
- Effectively leverage relevant data as input to making decisions.
- Appropriately assess risks before making a decision.
- Comprehensive understanding of what sexual violence, harassment and discrimination are, and their varying effects on diverse members of the community.
- Question and take appropriate steps to address attitudes, macroaggressions and other behaviours which are discriminatory. Acknowledges and respects diverse cultural traditions, abilities and beliefs.