Job Title	**Officer, Gift Planning**
Employee's Name	TBC
Manager's Title	Director, Annual Giving
Manager's Name	Kourtney Parker
Employment Type	Full-Time | Permanent
Date Completed	November 12, 2026

TEAM OVERVIEW

The Annual Giving team plays a vital role in connecting our community to the impact of philanthropy at Waterloo Regional Health Network Foundation. Through a diverse portfolio of fundraising programs, including direct mail and digital appeals, monthly giving, grateful patient giving, planned giving and other annual fundraising initiatives, the team inspires generosity and builds lasting relationships with donors.

As a member of the Annual Giving team, you will work alongside passionate, collaborative colleagues committed to creating meaningful donor experiences and growing sustainable philanthropic support for local health care.

Planned Giving is an important part of this work, helping individuals and families create lasting legacies through thoughtful, personalized giving opportunities. You will collaborate closely with colleagues across Annual Giving, Major Gifts, Marketing and Donor Engagement to identify opportunities, strengthen donor relationships and inspire gifts that will make a difference for generations to come.

POSITION SUMMARY

The Officer, Gift Planning provides strategic leadership and operational accountability for the growth, performance and long-term sustainability of Waterloo Regional Health Network Foundation's planned giving program.

As the Foundation's subject matter resource in legacy and estate giving, this position develops and executes a comprehensive planned giving strategy that strengthens the long-term philanthropic pipeline, increases documented legacy commitments and advances investment in health care.

The role independently manages prospective and confirmed legacy donors, leading sensitive and complex conversations involving bequests, life insurance, estate distributions and other planned giving arrangements. It exercises independent judgment while working with Foundation leadership, Major Gifts, Annual Giving, Finance, hospital stakeholders and professional

advisors.

KEY RESPONSIBILITIES

Strategic Leadership and Program Accountability

- Lead the development, implementation and evaluation of a multi-year planned giving strategy aligned with fundraising and campaign priorities.
- Assume accountability for program performance, growth and sustainability, including annual plans, objectives and key performance indicators.
- Strengthen planned giving policies, processes and practices with Foundation leadership and Finance.
- Advise leadership on donor trends, emerging opportunities, risks and long-term legacy revenue.
- Lead planned giving marketing and donor engagement strategy.

Advanced Donor Portfolio Management and Solicitation

- Independently manage a portfolio of prospective and confirmed legacy donors, accountable for cultivation, solicitation and documented commitments.
- Lead sensitive discussions involving estate intentions, family circumstances, philanthropic priorities and deferred giving.
- Develop individualized engagement strategies from identification through long-term stewardship.
- Partner with Major Gifts on blended current and future giving opportunities.
- Prepare sophisticated donor proposals in collaboration with qualified legal, financial and tax advisors.
- Exercise judgment on cultivation priorities and escalation of complex donor matters.

Legacy Stewardship and Donor Engagement

- Lead development and management of the Foundation’s legacy recognition and stewardship program.
- Establish personalized engagement for confirmed legacy donors.
- Strengthen retention, documentation of intentions and continued philanthropic involvement.
- Oversee legacy communications, recognition, impact reporting and events.
- Guide sensitive donor and family communications involving bereavement and estate matters.

Professional Advisor and External Relationship Development

- Build a strategic network of estate lawyers, financial planners, accountants, estate trustees and other professional advisors.
- Represent the Foundation in complex donor and advisor discussions.
- Develop referral relationships and advisor education initiatives.
- Collaborate with external specialists to ensure appropriate advice and organizational risk management.

Estate Administration, Financial Oversight and Risk Management

- Oversee coordination of the estate gift pipeline, including beneficiary notices, anticipated

distributions and outstanding matters.
- Work with Finance and external legal representatives to monitor administration, support timely distributions and escalate issues.
- Establish reliable estate tracking and forecasting processes for financial planning.
- Assess anticipated estate revenues, timing and risks, providing projections to leadership.
- Ensure accurate, confidential records and consistent follow-up.

Cross-Functional Leadership and Organizational Integration

- Serve as the internal planned giving subject matter resource for fundraising colleagues.
- Integrate legacy giving into donor strategies, campaigns and philanthropic proposals.
- Develop training and practical resources to help colleagues identify and initiate planned giving conversations.
- Collaborate with hospital leaders on long-term clinical funding priorities.
- Lead cross-functional initiatives involving Development, Marketing, Stewardship and Finance.

Performance Measurement, Forecasting and Reporting

- Establish and monitor metrics for qualified prospects, engagement, documented intentions, confirmed commitments and estate revenue.
- Oversee planned giving data quality in Blackbaud Raiser's Edge NXT.
- Produce analysis and forecasts on pipeline strength, performance, opportunities and risks.
- Recommend improvements and inform leadership decisions on priorities and resources.

EDUCATION AND EXPERIENCE

Required

- Minimum five to seven years of progressive experience in fundraising, planned giving, major gifts, estate administration or related relationship management.
- Experience independently managing significant donor relationships and complex philanthropic opportunities.
- Demonstrated success developing fundraising strategies and delivering measurable results.
- Strong working knowledge of planned giving vehicles, estate administration and charitable gift planning.
- Experience with legal, financial and estate planning professionals.

Assets

- Hospital foundation or health care experience is an asset; CFRE or specialized planned giving education is an asset.

SKILLS AND COMPETENCIES

- Strategic thinking, independent judgment and accountability for program outcomes.
- Advanced relationship management and solicitation skills.
- Understanding of charitable gift planning, estate administration and deferred gift financial implications.
- Ability to advise senior leaders and collaborate with professional advisors.

- Excellent communication, analytical, forecasting and reporting capabilities.
- Exceptional discretion, ethical judgment and donor confidentiality.
- Ability to lead cross-functional projects independently.
- Proficiency with Blackbaud Raiser's Edge NXT and related tools.

PARTNERS AND COLLABORATORS

- Foundation-wide staff: Development/Major Gifts, Annual Giving, Communications, Finance, Stewardship, and Leadership
- Hospital-wide partners including Clinical Leads, Physicians, and Executive Leadership
- Professional advisors (e.g., estate lawyers, financial planners, accountants, estate trustees)
- Legacy prospective donors, confirmed legacy donors, and donor families

ADDITIONAL REQUIREMENTS

- Flexibility for occasional evening and weekend commitments.
- Valid driver's licence and reliable transportation for local donor visits.
- Police background check.
- Commitment to WRHN Foundation's mission, vision and values.
- Close access to Kitchener-Waterloo

WHAT WE OFFER

- **Salary Range:** The target hiring range for this role is $86,700 to $102,000, with ability to progress commensurate with experience and success.
- **Work Culture:** Hybrid and flexible work environment, with a minimum of two days per week in the office to support collaboration, team engagement and organizational connection.
- **Purpose:** Opportunity to lead a strategic program with a lasting impact on regional health care.
- **Growth:** This position offers an experienced fundraising professional the autonomy to shape a critical component of the Foundation's long-term philanthropic strategy, influence organizational fundraising practices and build a lasting legacy of support for local health care.

WRHN Foundation Values

- Trust
- Transparency
- Collaboration
- Innovation
- Excellence

THE PROCESS

At WRHN Foundation, our team is united by a shared mission to inspire philanthropy and elevate healthcare across our region. We welcome candidates from all backgrounds who bring curiosity, excellence, and a collaborative spirit to their work.

If you are excited about this opportunity, we encourage you to apply with your résumé and a cover letter detailing your relevant experience and enthusiasm for our mission.

We are committed to fair and accessible hiring practices. If you require accommodation during the recruitment process, please inform us and we will work with you to meet your needs.

This posting is for an existing vacancy. Our hiring process does not use artificial intelligence (AI) to screen, assess, or select candidates. All applications are reviewed directly by our hiring team.

Please apply here (https://wrhnfcareers.applytojobs.ca/development/52445) by Friday, December 4th at 5:00pm.