



WRHN
FOUNDATION

Waterloo Regional
Health Network



Job Title: Development Officer, Planned Giving

Reports To: Director, Annual Giving

Location: Kitchener-Waterloo, Ontario (Hybrid)

Employment Type: Full-Time | Permanent

Position Summary

The Development Officer, Planned Giving plays a key role in growing and stewarding a sustainable planned giving program for the Waterloo Regional Health Network (WRHN) Foundation. This role focuses on identifying, cultivating, soliciting, and stewarding donors who wish to make legacy gifts, including Gifts in a Will bequests, life insurance, and other deferred giving vehicles - creating lasting impact on local health care for WRHN.

Working closely with Foundation leadership, major gift team, professional advisors, physicians, hospital staff, and external partners, the Development Officer, Planned Giving builds long-term, mission-driven relationships rooted in trust, compassion and purpose.. The role also contributes to program strategy, project coordination, and data-driven reporting that supports the Foundation's long-term fundraising goals and transformational impact on health care for 10% of Ontarians.

Key Responsibilities:

1. Planned Giving Program Management

- Manage and grow a portfolio of planned giving prospects and committed donors.
- Develop and implement tailored identification, cultivation, solicitation, and stewardship strategies focused on a pro-active legacy giving based on major gift best practices.
- Conduct donor meetings (virtual and in person) to discuss planned giving options, philanthropic goals, and long-term impact.
- Document all donor interactions, intentions, and moves management activity in the Foundation's donor database.
- Lead the creation of a marketing strategy and materials for a pro-active legacy giving program, including but not limited to, website, planned giving one pages, and stewardship program.



WRHN

FOUNDATION

Waterloo Regional
Health Network



- Provide Foundation leadership with reporting on the key performance indicators for the program.

2. Donor Cultivation & Solicitation

- Promote planned giving opportunities through one-on-one conversations, written proposals, and donor-facing materials.
- Collaborate with Foundation leadership and hospital stakeholders to identify priority funding opportunities suitable for legacy gifts.
- Support the integration of planned giving opportunities (i.e. direct mail reply cards) and conversations across major gift, annual giving, and campaign strategies.

3. Stewardship & Relationship Management

- Develop and execute meaningful stewardship plans for planned giving donors including regular legacy communications (i.e. newsletter(s), etc)
- Lead the development of the Foundation's legacy society for stewardship of its members.
- Coordinate recognition activities, impact reporting, and engagement opportunities (i.e. legacy lunch) for legacy donors and their families.
- Build trusted, long-term relationships that encourage continued commitment, advocacy, and philanthropic legacy.

4. External Partnerships & Liaison

- Act as a liaison with external partners, including consultants, professional advisors (lawyers, financial planners, estate trustees) and community organizations.
- Cultivate and maintain relationships with advisor networks to increase awareness and referrals for planned giving opportunities.
- Develop a marketing program to external partners to promote planned giving to the Foundation for their clients.
- Represent the Foundation at relevant community events, seminars, and partner meetings.

5. Collaboration & Project Coordination

- Work closely with Foundation colleagues across major gifts, annual giving, communications, stewardship and events to align planned giving initiatives.
- Coordinate planned giving projects, campaigns, and donor communications from concept through execution.
- Participate in team planning sessions, campaign meetings, and cross-departmental initiatives.
- Collaborate with the Development team on prospect identification, clearance and assignment.



WRHN

FOUNDATION

Waterloo Regional
Health Network



- Support major gift team members to achieve their annual goals with their respective pipelines to secure gifts outside your personal planned giving pipeline.

6. Reporting, Data & Administration

- Manage planned giving data, reports, and pipeline tracking in Blackbaud NXT Raiser's Edge.
- Prepare regular reports, forecasts, and analysis on planned giving activity, donor trends, and program performance.
- Develop with the Finance and Operating, a tracking system of all Notices to Beneficiaries from estates to forecast Foundation cash flow.
- Support communications with Estate Agents and Trustees to secure all of the Foundation's Gifts in a Will.
- Support data-driven decision-making through reports, analysis, and special projects related to development operations.
- Contribute to the Foundation's overall development operations as required.

Education and Experience

- 3–5+ years of experience in fundraising, planned giving, major gifts, or relationship management.
- Experience in healthcare, hospital, or nonprofit environments is considered a strong Asset.
- CFRE designation or progress toward CFRE is considered an asset.
- Working knowledge of estate and gift planning concepts.

Skills & Competencies

- Strong relationship-building skills with the ability to engage donors and professional advisors with empathy and credibility.
- Excellent written and verbal communication skills, including the ability to explain complex giving concepts clearly and compassionately.
- Highly organized with demonstrated experience coordinating projects and managing multiple priorities.
- Analytical mindset with experience managing data, reports, and development metrics.
- High level of professionalism, discretion, and ethical conduct.
- Proficiency with Blackbaud NXT Raiser's Edge, Microsoft Office and Google Workspace.

Additional Requirements

- Willingness to work flexible hours, including occasional evenings or weekends.
- Valid driver's license and access to reliable transportation for local donor visits.



WRHN

FOUNDATION

Waterloo Regional
Health Network



- Police background check required.
- Commitment to the mission, vision, and values of the WRHN Foundation and a passion for improving local healthcare.

What We Offer

- Salary Range: \$73,950- \$86,700, commensurate with experience and success.
- Vacation: 4 weeks' vacation
- Benefits: Comprehensive benefits, HOOPP defined-benefit pension, computer and mobile device provided.
- Work Culture: We offer a hybrid and flexible work environment, with regular in-person team strategy sessions and a minimum of one day per week in the office to support collaboration and connection.
- A mission-driven team where your voice matters and your professional growth is supported.

The Process

We're looking for someone who brings heart, hustle, and humility. If that sounds like you - apply in the way that best shows your passion and strengths. Whether that's a traditional resume and cover letter or something more creative (video, portfolio, or personal story), we're excited to meet you.

We are committed to barrier-free recruitment and selection processes and encourage applicants to inform us of any accommodation they may require.