St JOSEPH's HEALTH CARE FOUNDATION

# Associate Director, Legacy Giving







***Position Brief***

# TABLE OF CONTENTS


The Opportunity ..... 2

About St. Joseph's Health Care London ..... 3

About St. Joseph's Health Care Foundation ..... 4

Fundraising at St. Joseph's Health Care Foundation ..... 4

Additional Information | Board of Directors ..... 5

Key Areas of Accountability ..... 6

Qualifications and Key Competencies ..... 7


## FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of St. Joseph's Health Care Foundation (SJHCF). For more information about this opportunity, please contact Jody Jacobson, Senior Consultant, KCI Search + Talent by email at: SJHCF-LG@kcitalent.com.

Interested candidates should send resume and letter of interest to the email address listed above by **November 29, 2026**. Applicants are encouraged to apply early as we will be reviewing and assessing applications as submissions are received. Applications will be held in strict confidence.

**Statement on Belonging, Dignity and Justice**
As our organization continues its own journey of learning and deeper understanding, we are committed to the principles of belonging, dignity and social justice. Every member of our community has a place of value and dignity in our organization. We will continue to strive to eliminate inequity and systemic barriers to participation. St. Joseph's Health Care Foundation will endeavor to develop competence, formal policies and structures to culturally embed these important principles into our operational and physical environments. Our commitment is rooted in our organization's values which include 'doing right' and further inspired by the traditions of inclusion and social justice of our founders, the Sisters of St. Joseph.

If you require accommodation, please notify the Search Consultant in advance and they will work with you to meet your needs. SJHCF is committed to providing accommodation throughout the recruitment and selection process.

*This posting is for a current vacancy. Artificial intelligence will not be used to screen resumes nor assess candidates in this search.*

# Associate Director, Legacy Giving

## THE OPPORTUNITY

St. Joseph's Health Care Foundation (London) is seeking a relationship-driven and mission-oriented fundraiser to join their team as **Associate Director, Legacy Giving**. Reporting to the Director, Development, the Associate Director will take on an exciting mandate to strengthen and grow the Foundation's legacy giving program, building on an established pipeline of donors and prospects who are deeply connected to St. Joseph's and its mission. The Associate Director will manage a portfolio of approximately 100 to 150 current and prospective legacy donors, giving the successful candidates a strong foundation to build from on day one.

Working in close collaboration with the Director of Development, the Associate Director will build upon the foundation already in place, strengthening and refining the strategies, structures, and systems needed to support the continued growth and evolution of legacy giving as a distinct program within the Foundation's growing fundraising function. The Associate Director will manage a portfolio of current and prospective donors, bringing thoughtful and individualized approaches to cultivation, solicitation, and stewardship. Drawing on experience either soliciting legacy gifts or on strong major gift fundraising experience, the Associate Director will be confident engaging directly with donors and prospects, guiding them thoughtfully through personal conversations about bequests, trusts, and other estate planning vehicles. This is not a role that works in isolation. The Associate Director sits within the Major Gifts team and works hand in hand with colleagues in Annual Giving and Communications to ensure that legacy giving is well integrated with the Foundation's broader fundraising strategy, identifying and engaging with donors with the capacity and interest to make meaningful gifts, both current and future.

St. Joseph's Health Care Foundation is in a period of growth and is committed to investing in the growth of the successful candidate. The Associate Director will be supported with role-specific professional development, including attendance at the Canadian Association of Gift Planners (CAGP) Original Canadian Gift Planning Course, a week-long intensive course that is well recognized across the sector, along with other leaning opportunities as needed. This makes the role an excellent next step for an accomplished major gift fundraiser who has had some exposure to legacy giving and is eager to deepen their experience.

The ideal candidate will be energized by the opportunity to shape and grow the Foundation's legacy giving program. The Associate Director will bring genuine warmth and curiosity to their relationships with donors, be comfortable with the long timelines that legacy giving requires and have a deep appreciation for what it means when someone chooses to leave a lasting legacy in support of health care in their community.

Full-time is preferred for this role, with openness to considering candidates seeking a minimum three-day-per-week arrangement. St. Joseph's Health Care Foundation fosters a collaborative, in-office work environment and values the connection and teamwork that come from working together in person.

The role is based in London, Ontario. The salary range is $85,429 to $106,801, with an industry leading pension plan (HOOPP), and an excellent benefits package.

## ABOUT ST. JOSEPH'S HEALTH CARE LONDON

St. Joseph's Health Care London has been caring for the body, mind, and spirit of people in London, Southwestern Ontario, and beyond for more than 150 years. It is one of the most complex health care organizations in Ontario and a major patient care, teaching, and research centre that serves a wide range of needs across multiple sites, including St. Joseph's Hospital, Parkwood Institute, Mount Hope Centre for Long Term Care, and the Southwest Centre for Forensic Mental Health Care.

A Catholic health care organization owned by the St. Joseph's Health Care Society of the Roman Catholic Diocese of London, St. Joseph's is also a proud partner in London's academic health sciences community. Its areas of clinical focus span acute and ambulatory care, complex and veterans care, long-term care, rehabilitation and specialized geriatrics, and specialized mental health care, making it a uniquely diverse and impactful institution.



## Lawson Research Institute



At the heart of St. Joseph's research mission is Lawson Research Institute. It's one of Canada's premier health research institutes and the research arm of St. Joseph's Health Care London. Affiliated with Western University through shared faculty appointments and collaborative research programs, Lawson is guided by a simple but powerful purpose: discovery-driven and patient-focused.

Lawson's researchers are recognized nationally and internationally for their work across six priority areas: aging, chronic diseases, imaging, mental health, mobility and activity, and surgical specialties. In October 2024, St. Joseph's relaunched Lawson as its own distinct research institute, marking a new chapter in its history and signalling a continued commitment to attracting top scientific talent, building new infrastructure, and deepening the integration of research and clinical care. With a new 2025–2030 strategic plan, Lawson is well-positioned to shape the future of health care in London and far beyond.

## ABOUT ST. JOSEPH'S HEALTH CARE FOUNDATION



Since 1977, St. Joseph's Health Care Foundation has been inspiring community investment in health care at St. Joseph's Health Care London. The Foundation's mission is clear and enduring: to transform health care through the power of giving. Every gift makes possible the kind of innovation and discovery that public funding alone cannot support, from advanced medical equipment to groundbreaking research to exceptional patient care experiences.

The Foundation is guided by a deep commitment to its donors. Accredited under Imagine Canada's Standards Program and a signatory to the Financial Accountability Code of Conduct, it holds itself to a high standard of transparency and stewardship. With a vision to transform health care through the power of giving, and a mission to inspire community investment in health care excellence, the Foundation is at an exciting moment.

### Mission

To inspire community investment in healthcare excellence at St. Joseph's.

### Vision

Transforming healthcare through the power of giving.

### Values

We believe in: Doing right, creating impact and giving thanks.

## FUNDRAISING AT ST. JOSEPH'S HEALTH CARE FOUNDATION

St. Joseph's Health Care Foundation has a strong and growing culture of philanthropy, built on decades of trust between the Foundation and the London community. Donors at every level are drawn to the Foundation's track record of putting resources to work in ways that are meaningful, measurable, and mission-aligned.

The 2024-25 fiscal year was an extraordinary one. Donors across the community raised more than $13.6 million in cash gifts, enabling the Foundation to disburse more than $8.7 million to priorities across St. Joseph's funding essential patient care equipment in rehabilitation, surgery, and imaging; advancing research in diabetes, mental health, and Alzheimer's disease; and enriching education for nurses, volunteers, and medical learners. The year also marked a significant milestone: a record $36.1 million in pledged revenues, anchored by a transformational 10-year commitment from Ontario's Workplace Safety and Insurance Board. In partnership with Lawson Research Institute, this investment will establish a first-in-Canada research hub dedicated to addressing the human and health costs of occupational injury and illness. This was the largest single grant ever received and stewarded by the Foundation.

The Foundation's fundraising program spans a broad range of giving channels, including annual giving, major gifts, planned giving, and special events, all working in concert to deepen donor relationships and grow philanthropic revenue. Annual giving plays a foundational role by building the pipeline of engaged donors whose commitment to St. Joseph's deepens over time. Legacy giving sits within the Major Gifts team, with close day-to-day collaboration across the organization and in particular with the Annual Giving and Communications teams.

As the Foundation looks ahead, it is focused on strengthening the programs and donor relationships that will sustain its growth, ensuring that St. Joseph's continues to have access to the resources needed to innovate, care, and discover in ways that make a real difference for patients and families in London and beyond.







## ADDITIONAL INFORMATION

About St. Joseph's Health Care Foundation

St. Joseph's Health Care Foundation Team

2025-2026 Community Impact Report

Your Impact Stories

Fundraising Priorities

2025 – 2026 Financial Statements

St. Joseph's Health Care London

2025 – 2030 St. Joseph's Strategic Plan

## BOARD OF DIRECTORS

- Alfonso Campos Reales, Chair
- Paul Hubert, 1st Vice Chair
- Jennifer Quick, 2nd Vice Chair
- Amir Shenouda, Treasurer
- Roy Butler, Hospital Representative
- Helen Connell
- Ashley Conyngham
- Mike Elkassem
- Jaafer Haidar
- Alex Lau
- Lucy Lee
- Ron Mikula
- Jay Nash
- Louise Poole
- Namit Sharma
- Michael Stewart
- Keith Trussler

## KEY AREAS OF ACCOUNTABILITY

- In collaboration with the Director, Development (Major Giving), develop and implement the strategy for a robust legacy giving program and moves management activity of legacy prospects.
- Manage a portfolio of approximately 100-150 current and prospective legacy giving donors.
- Build and maintain relationships to identify, cultivate, solicit, and steward donors who make charitable gifts through bequests, trusts and other estate planning strategies. This involves identifying potential prospects, utilizing prospect research, developing individual cultivation, solicitation and stewardship strategies.
- Develop and implement solicitation strategies for legacy gifts, including making direct asks and including others in the solicitation process as required, i.e. foundation and hospital leadership and board members.
- Understand the identified fundraising priorities and articulate those to potential donors, matching their passions and interests.
- Integrate legacy giving opportunities into broader fundraising initiatives, campaigns and events.
- As a subject-matter expert, provide guidance and support to colleagues as needed on legacy giving best practices.
- In collaboration with Major Gift colleagues, identify legacy prospects with the capacity to make current mid-level and major gifts, and explore opportunities for blended gift arrangements that combine a current outright gift with a future legacy commitment. Participate in donor meetings alongside major gift fundraisers when appropriate.

- In collaboration with the Annual Giving team, identify and engage loyal donors whose sustained commitment to St. Joseph's may indicate an interest in making a legacy gift.
- Oversee the administration of planned gifts, including working with donors' legal and financial advisors, executors and lawyers, managing necessary documentation and acknowledgement processes.
- Utilize Raiser's Edge/NXT, tracking and managing donor interactions, donations, and engagement activities, ensuring accurate and up-to-date records.
- Attend Foundation and purposeful community events to identify potential new prospects.
- Together with the Donor Relations and Stewardship Officer, ensure that legacy donors receive appropriate recognition and stewardship for their support, including personalized stewardship plans.
- Participate in professional development, including the CAGP Original Canadian Gift Planning Course, to build and maintain legacy giving expertise.
- Ensure all interactions are respectful, donor-centred and in keeping with the organization's values.
- Work as a team player promoting a positive and professional work environment and conducts the role with integrity and respect.
- Support the work of the Foundation and its team with other duties and special projects as assigned.
- Serve as an ambassador of the Foundation and the Hospital to the broader community.
- Abide by the policies and procedures of St. Joseph's Health Care London and the Foundation.

## QUALIFICATIONS AND KEY COMPETENCIES

**Skills, Experience & Education**

- Progressive experience in fundraising, ideally with demonstrated experience in legacy gift fundraising. Candidates with a strong major gifts background and genuine interest in transitioning into legacy work are encouraged to apply, particularly those who have exposure to estate planning or bequest-related discussions with donors. Training will be provided, including the CAGP Original Canadian Gift Planning course.
- Knowledge of, or exposure to, legacy giving vehicles and strategies, including bequests, gifts of insurance, gifts of securities, and other deferred giving arrangements.
- Demonstrated experience managing a personal portfolio of donors through identification, qualification, cultivation, solicitation, and stewardship. Experience personally soliciting donations from individuals, including in the context of complex or sensitive conversations.
- A general understanding of tax laws, estate planning and planned giving vehicles and an eagerness to build on that knowledge.
- Willingness to engage with professional advisors such as estate lawyers, financial planners, and trust officers.
- Ability to work collaboratively with senior leadership, volunteers, professional advisors, and cross-functional fundraising colleagues to advance donor relationships and philanthropic opportunities.

- Strong project management and organizational skills, with the ability to effectively present complex information in a clear and compelling manner.
- Working knowledge of Raiser's Edge software is a definite asset.
- University degree is preferred, and an equivalent combination of experience and training will also be considered. CFRE professional designation and/or CAGP membership or coursework is an asset.

**Abilities, Qualities & Attributes**

- Genuinely curious about people and skilled in building meaningful relationships.
- Active listening skills that build trust and establish rapport.
- Persistence and comfort with ambiguity and long timelines.
- Strong interpersonal skills to engage successfully with volunteers, donors and others in a highly professional manner.
- Exceptional organizational and time management skills, attention to detail, accuracy and professionalism.
- Strong oral and written communication skills.
- Self-motivated with ability to work independently and meet deadlines.
- Results-oriented with the ability to achieve identified metrics to contribute positively and effectively to the organization's goals and objectives.
- Optimistic attitude, skilled in having crucial conversations within the work environment.
- Comfortable navigating complexity, change, and ambiguity while maintaining focus on donor experience, growth, and long-term impact.
- A learning mindset and enthusiasm for growing expertise in legacy giving.