



Job Posting
Philanthropy Officer (Planned Giving)

DEPARTMENT: Philanthropy

REPORTS TO (TITLE): Director of Philanthropy

SALARY: \$60,722.99

POSTING DATE: September 28, 2021

About Ecojustice:

Our Mission is why people join Ecojustice. We fight for something bigger than ourselves. We use the power of the courts to defend what we value most. We believe in protecting the environment while having enough time off to enjoy it. If you are courageous, collaborative and dedicated to the fight for a healthier environment, you will find your people here.

About the Role:

This is a terrific opportunity for someone passionate about protecting people and our planet who enjoys working with donors to create a legacy for environmental protection. The Philanthropy Officer is responsible for increasing revenue from planned giving by developing, implementing and evaluating marketing strategies to inspire donors to leave a gift in their will and manages relationships with existing donors.

Reporting to the Director of Philanthropy, and working with other staff and volunteers as required, the Philanthropy Officer uses relationship management, administration, marketing and problem solving skills to enhance the planned giving program.

A commitment to inclusive, authentic communication and ethical fundraising practices, attention to detail, and the ability to collaborate professionally enable the Officer to build strong relationships with donors, professional advisors and colleagues.

This role is remote based until at least Winter 2021, but ideally the candidate will be able to access Ecojustice's Vancouver office once public health orders allow.

DUTIES & RESPONSIBILITIES

Develop and manage a portfolio of planned giving donors

- Manage and cultivate relationships with individuals who have included Ecojustice in their estate plans, or who have expressed an interest in this
- Analyze donor information to determine and prioritize donors, and create stewardship plans for different segments of planned giving donors
- Develop relationships through personal visits and other communication
- Monitor and evaluate donor engagement/cultivation, recognition and stewardship strategies and bring forward new engagement opportunities

Increase the number of planned giving donors

- Working with the Director of Philanthropy, Annual Giving Manager, and/or Communications Team, develop and implement planned giving marketing and acquisition strategies
- Develop and manage relationships with allied planned giving professionals

- Respond to indications of interest in planned giving from donors in a timely manner, provide technical information and follow up to acquire formal confirmation of the gift
- In consultation with other Philanthropy Staff, develop and implement tailored solicitation strategies and proposals for prospects/donors, including detailed gift proposals using bequests, life insurance, securities, annuities, charitable remainder trusts and similar instruments

Increase efficiency in estate administration

- Develop and maintain an administration system using Raiser's Edge to facilitate the moves management strategy and keep records of donor interactions and relationship history
- Identify opportunities for improving efficiency in administration
- Engage, train and supervise, Philanthropy Associate and volunteers to assist as required

Plans and manages budgets

- With the Director of Philanthropy, develop budgets (revenue and expense), and reforecast for the planned giving program as required,
- Conduct analysis and report on quarterly targets
- Participate in annual planning
- Identify trends in donor portfolio and trends in giving and respond appropriately
- Contribute to ongoing development of the Planned Gifts program and Philanthropy through analysis and creative problem solving

Other

- In consultation with the Director of Philanthropy, engage and liaise with professional advisors for counsel to help resolve complex or contested estate files as necessary
- Maintains knowledge of federal and provincial estate, trust and tax laws that impact planned giving

Note: This job may require additional responsibilities and duties as assigned by Ecojustice

KNOWLEDGE, SKILLS & CAPACITY

Knowledge required to perform duties:

- Experience in planned giving, law, accounting, insurance, financial planning or financial management an asset
- Detailed and in depth knowledge of the tax system, estate planning and various gift vehicles
- Knowledge of budgeting and financial reporting
- Solid knowledge of Microsoft Office
- Proficiency in Raiser's Edge database
- Knowledge of Imagine Canada and AFP Ethical Fundraising Code – Code of Ethics and Accountability
- Knowledge of CRA regulations
- Awareness of and strong interest in environmental issues

Skills and abilities required to perform duties:

- **Communication and Collaboration skills** - Clearly articulates technical information through verbal and written communication, internally and externally, accurately, creatively and persuasively. Ability to work within a team environment.
- **Networking, Personable and Relationship building** - Works collaboratively with internal and external stakeholders, demonstrates and builds strong working relationships in a team. Develops and

nurtures long term relationships with donors and ability to establish and cultivate relationships with estate planning allied professionals.

- **Willingness and ability to learn** – Takes initiative to learn about the various ways of making gifts and the relevant laws related to donations.
- **Planning Skills** – Develops strategic work plans and systems to monitor and track tasks and projects, and completes assigned work on time.
- **Critical Thinking and Problem Solving**, tackle complex problems in the workplace using analytical problem solving techniques, creative thinking, effective research and collaboration including asking for assistance as needed.
- **Administrative Acumen:** Ability to use Raiser's Edge to create reports and develop and use the data base to carry out and track activities with planned gift donors and prospects and to monitor program results. Is methodical, precise and systems-oriented and diligent in creating and maintaining files (electronic and paper).
- **IT:** Familiarity with MS Office, Raiser's Edge and online fundraising platforms.
- **Travel:** Ability to travel within Canada.

EDUCATION & EXPERIENCE REQUIREMENTS

- Bachelor's Degree
- 3 + years of experience
- Experience with fundraising, planned giving, donor relations, accounting, insurance, financial planning or financial management, and relationship building
- CAGP membership considered an asset

Ecojustice is committed to creating a diverse, equitable, and inclusive work environment. We welcome applications from individuals with the relevant technical skills, and especially those who are Indigenous, Black, people of colour, 2SLGBTQ+, and/or members of marginalized populations. If you are a member of any of these groups, we welcome you to self-identify within your application, cover letter, or resume.