



Director, Legacy Giving

Employment Terms: F/T, Termed Contract 5-years

Start Date: April 2022

Upper Canada College (UCC) is focused on making the world a more just and inclusive place through dialogue and teamwork. With a commitment to equity and fairness, students learn that what makes us different as individuals makes us stronger as a community. A rigorous academic program is supported by accomplished faculty, exceptional co-curricular programming, and state-of-the-art facilities. The UCC experience is underpinned by five core values: learning, pluralism, service, community, and wellbeing. Among its strategic goals is UCC's ambition to become more diverse and inclusive. This is supported by a recognition that no learning community is whole without the inclusion and amplification of multiple voices; UCC is committed to fostering belonging, striving for justice and peace among all people, and addressing systemic and structural forms of oppression.

Position Overview:

You will be responsible for the development, planning, implementation, and evaluation/reporting of UCC's Legacy Giving program. You will also work with internal and external constituents to maximize fundraising net revenue through legacy gifts. Key responsibilities include building and managing relationships with prospects, donors, estate and financial planning professionals, and leading and ensuring operation of stewardship and recognition programs focused on existing known/expectancy donors and realized gifts to the organization.

You will work cooperatively with the Major Gifts team, Community Relations team, and Communication team to ensure cross-program coordination and effectiveness, with a particular focus on building pipeline and revenue. This role will report to the AVP, Advancement.

Key Responsibilities:

Revenue Generation & Relationship Building:

- Lead and grow the Legacy Giving Program for the organization;
- Maintain a portfolio of legacy and major gift donor prospects and connect, engage, motivate and steward everyone in the LG pipeline;
- Identify, cultivate and solicit legacy gifts and, where appropriate, lifetime gifts from members of the UCC family;
- Develop and manage close working relationships with internal stakeholders, and include them in all appropriate stages of relationship management for prospects and donors;
- Strengthen donors' relationships so that those able to augment or accelerate their gifts will consider doing so, and that those committing revocable gifts will not alter their intentions.

Program Administration:

- Create and manage budgets for the program and provide reporting and updates on status to the supervisor;

- Create and manage marketing and engagement plans for UCC's stakeholders and ensure timely and effective operations of the marketing program;
- Prepare customized funding proposals, agreements and gift scenarios involving cash, securities, estate gifts (bequest gifts) life insurance and other major and planned gift vehicles in order to meet the donor's personal, estate and financial planning goal;
- Plan and implement the overall cycle for Legacy giving program including qualification, cultivation, solicitation, and stewardship activities, requiring time spent analyzing and manipulating data in order to combine mass solicitation methods with increased personalization;
- Ensures proper administration of donor information in donor databases and supply reports and analysis;
- Work closely with Advancement Services to ensure timely and accurate processing of gifts, tax receipts and reporting;
- Work with colleagues to ensure appropriate and timely recognition of all gifts received;
- Develop strategies for new and innovative ways to engage current and prospective legacy donors;
- Manage correspondence and inquiries from alumni and donors, ensuring timely and appropriate response;
- Works well with and develops strong relationships with key volunteers.

Key Experience, Knowledge and Competencies:

- Willingness to adapt and change based on the unique and diverse needs of individuals;
- Commitment to honesty, justice, fairness and equity;
- Display humility and empathy, and recognize your ability to positively influence change; Embrace the opportunity and responsibility to make a difference in your local and global communities;
- Adhere to all Provincial and Federal legislation and conducts all business according to the CAGP/AFP Code of Ethics;
- Provide individualized consideration for both donors and volunteers to meet their needs and expectations;
- Ensure appropriate and timely recognition of all gifts received;
- Ability to work in a team environment and support advancement colleagues in the engagement of prospects and donors in legacy giving discussions and securing gifts;
- Advise prospects, donors, senior volunteers, staff and allied professionals on strategic moves and opportunities related to legacy gifts;
- Knowledge of fundraising principles including an understanding of planned giving vehicles;
- A strong relationship builder with a belief in UCC's values;
- Excellent written and oral communication and public speaking skills;
- Strong project management and coordination skills;
- Demonstrated research, analytical, problem solving, and budgetary skills;
- Attention to detail with exceptional active listening skills;
- Ability to identify opportunities and capitalize on them;
- Professional attitude, self-starter, flexible and creative revenue generator;
- Demonstrated ability to lead a program of this nature within a bustling and ambitious school.
- Post-secondary education in marketing, communications, public relations, fundraising, or equivalent work experience;
- 7+ years of progressive experience in relationship management, advancement, advising, marketing or community engagement with a demonstrated track record of conversions/fundraising success;
- Volunteer management experience;
- Demonstrated prospect research, analytical, problem solving and computer skills;
- Donor/client database experience essential;
- Proficient in Google office and Raiser's Edge;
- Be a mentor for an IB continuum project (Personal Project, PYP Exhibition or Extended Essay).

If you have the majority of the qualifications we're looking for, we encourage you to express your interest by submitting your application.

Please complete all application instructions below when applying.

UCC is an Equal Opportunity Employer and values diversity, encouraging applications from all qualified individuals and welcome applications from women, visible minorities, Aboriginal peoples, persons with disabilities, and LGBTQ persons. UCC embraces pluralism – celebrating differences, cherishing similarities, and giving voice to multiple perspectives. If you are contacted regarding a UCC opportunity, please advise if you require any accommodations.

Please [apply online](#) by creating a “**Professional/Management**” profile account by **Tuesday March 15, 2022**. We thank all candidates in advance; however, we will contact only those selected for an interview.

As part of your application please include a resume and cover letter. **In your cover letter, address the following prompt:**

1. Upper Canada College values diversity as a source of strength. How would you contribute to the diversity of Upper Canada College in your role?

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