



JOB DESCRIPTION	
POSITION (Title):	Senior Philanthropy Associate, Major and Legacy Gifts
DIVISION:	PRESIDENT & CEO
DEPARTMENT:	St. JOSEPH'S FOUNDATION OF THUNDER BAY
SITE:	ST. JOSEPH'S HERITAGE
REPORTS TO (Title):	President and CEO – ST. JOSEPH'S FOUNDATION OF THUNDER BAY

GENERAL ACCOUNTABILITY: Reporting to the President/CEO, the Senior Philanthropy Associate, Major and Legacy Giving is a strategic professional role with the opportunity to build a portfolio of major donors to the Foundation. The Philanthropy Officer will also be responsible for expanding the outreach to major donors in an effort to increase our legacy giving program.

SPECIFIC ACCOUNTABILITIES:

Major Gift Philanthropy:

- With support where needed, conducts all cultivation, solicitation, and stewardship activities for a portfolio of prospective and current donors giving, including targeted personal touchpoints
- Build and manage a portfolio of 75+ active major gift donors and prospects
- Help transition donors to higher level of giving
- actively engage new major gift donors through referrals, data analysis, prospect research networking and strategic outreach, working with an existing list and prospect list
- promptly updates Donor Perfect with all appropriate notes and related actions
- Maintain accurate records of planned giving commitments and provide regular updates to the President/CEO on major gift giving activity and revenue projections

Legacy Philanthropy

- Develop and implement strategies to cultivate and solicit planned gifts from donors interested in making legacy commitments to SJFTB
- Identify and steward e legacy giving donors and prospective donors, providing personalized support and guidance through the gift planning process
- Maintain accurate records of planned giving commitments and provide regular updates to the President/CEO on legacy giving activity and revenue projections

Prospect Research and Pipeline Management

- Work with the Philanthropy Specialist to identify prospects for sponsorship of events
- Analyze data, track activity and prepare reports, including up-to-date prospect pipeline and active proposal evaluations required to formulate, execute, evaluate and benchmark strategic and priority driven implementation plans
- Ensure requests for information from donors or prospects are addressed quickly, accurately and with all pertinent information recorded appropriately

- Participate in the development and execution of the Foundation annual business plan
- Works with the President/CEO to enhance Donor Perfect functionality to build our major donor pipeline

Reporting and Analysis

- Provide regular reports on major gift fundraising activities, including progress toward fundraising goals, donor engagement metrics, and revenue projections
- Conduct on going analysis to evaluate the effectiveness of the major gift fundraising strategies and make data-driven recommendations for improvement

Health and Safety:

Employee Health & Safety

- Responsible for following all Occupational Health and Safety regulations and relevant organizational policies and procedures to ensure personal safety and safety of others
- Participates in monthly safety inspections, emergency drills and training programs as required
- Reports any equipment, safety concerns or hazards to supervisor

Client Safety

Supports and contributes to a culture of safety and promotes client safety:

- Responsible for following organizational policies and procedures
- Identifies and informs managers/supervisors of client safety problems and concerns, including actual and potential adverse events and incidents
- Assesses client safety issues and concerns and actively participates in improvement activities
- Utilizes effective and appropriate mechanisms for the transfer of information at interface points
- Utilizes verification processes and other checking systems for high risk care/service activities
- Participates as required in training on targeted client safety focus areas

ORGANIZATIONAL RELATIONSHIPS

- Reports to President/CEO, St. Joseph's Foundation of Thunder Bay
- Works with St. Joseph's Foundation employees and volunteers
- Maintains involvement with St. Joseph's Care Group employees, local businesses, and organizations, and the general public
- Maintains collaborative working relationships with all internal and external contacts, ensuring behaviors are congruent at all times with SJFTB Principles of Conduct

QUALIFICATIONS

Education/Experience:

- Related post-secondary education, a CFRE would be considered an asset
- Minimum 3-5 years of experience in major gift fundraising with a proven track record of closing gifts or securing contracts
- An understanding of legacy gift philanthropy
- Consideration will be given to candidates with comparable experience in related industries
- The candidate will be results-driven, a self-starter and highly motivated with a leadership and interpersonal style that fosters collaborative and productive relations with a diverse group of people

Skills/Abilities:

- Demonstrated success in one-to-one personal gift solicitation and/or a strong aptitude for sales with demonstrated success
- Demonstrated motivational and problem solving capabilities with a high degree of integrity, ethics and dedication.
- Knowledge of fundraising principles and practices

- Professional and ethical standards for handling confidential information
- Excellent written and verbal skills
- Demonstrates a strong ability to appreciate, respect, and work effectively with individuals from diverse cultural backgrounds and experiences.
- Demonstrated ability to strategize, build and implement constituency programs and activities and analyze results
- Strong planning, organizational skills and attention to detail
- Ability to organize multiple priorities and conflicting deadlines
- Ability to work independently, combined with the skills to thrive in a team-based environment
- Willingness to participate and assist in other areas of Philanthropy, when necessary
- Proficiency in Microsoft Office Suite and a working knowledge of Donor Perfect and records management, considered an asset.
- Ability to work evenings and weekends as needed
- Represents the Foundation with integrity in a professional, ethical, accountable and consistent manner
- Familiarity with the philanthropic community of Thunder Bay
- Working knowledge of *Occupational Health & Safety Act*

Assets:

- Ability to speak and communicate in French

CONDITION OF EMPLOYMENT:

- Ability to travel to various work locations as required and provide own transportation
- Must undergo a successful Criminal Record and Judicial Matters Check (CRJMC)

REVIEWED & APPROVED BY:			
DIRECTOR:	G. BRESCIA	DATE:	
HUMAN RESOURCES:		DATE:	
SUPERSEDES:		DATE:	