



PWRDF

The Primate's World Relief
and Development Fund

Position Title: Planned Giving and Donor Relations Officer
Reporting to: Director of Fundraising and Supporter Relations
Location: Ecclesiastical Province of British Columbia and the Yukon
(exact location to be determined)

The vision of PWRDF is for a truly just, healthy and peaceful world.

Within that vision, this contract position is responsible for engaging donors and increasing revenue in support of PWRDF and its partners around the world, including in Canada. The incumbent will work closely with others in PWRDF in sharing the results of our programs and the lasting value add of our partnerships.

A significant part of this work is in developing and implementing planned giving strategies to existing and prospective donors. The incumbent will work with staff, volunteers and local diocesan clergy and staff in promoting PWRDF as a charity of choice of international humanitarian and development work, around the world, including in Canada.

The incumbent thrives in a diverse and rights-based organization. The incumbent values the historical legacy that PWRDF enjoys with the Anglican Church of Canada and draws on this legacy and Scriptural mandate to promote PWRDF as it strives for a fairer and more sustainable and inclusive world.

The incumbent appreciates and complements the work of other ministries and agencies of the Anglican Church of Canada, recognizing the need and opportunity to contribute to our mutual and collaborative engagement with Canadian Anglicans and the communities in which we live and serve.

1. Specific responsibilities:

Planned Giving

- Increase revenue from planned giving by developing, implementing and evaluating strategies to acquire new planned giving donors and manage relationships with existing donors.

- Initiate discussions and follow up with individuals who are interested in planned gift opportunities with PWRDF, with a goal of increasing PWRDF's number of known bequests and other planned gifts.
- In consultation with the Director, develop and implement a comprehensive plan for the marketing and acquisition of planned gifts, including the development of information resource materials.
- Assist in identifying, contacting, qualifying and cultivating prospective donors and donor groups
- Develop and manage relationships with allied planned giving professionals
- Organize and help conduct training and information sessions for prospective donors, professional financial and estate planners, and other constituencies as required
- 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
- Develop and maintain an administration system using Donor Perfect to keep records of donor interactions and relationship history
- Meet personally (virtually or in person) with planned gift prospects, confirmed donors, and their advisors as required

Donor Relations

- Support acquisition and stewardship work of PWRDF, working closely with other ministries and agencies of the Anglican Church of Canada in the Ecclesiastical Province
- Work closely with volunteers, clergy and others in the Ecclesiastical Province to identify and engage with other prospective donors, including foundations, the private sector and other community associations that would wish to support designated or undesignated initiatives of PWRDF and its partners.

Team and Organizational Responsibilities:

- Perform routine administrative tasks related to this work
- Contribute to measuring Team KPIs
- Undertake speaking engagements, presentations and workshops on behalf of PWRDF
- Work within PWRDF policy, guidelines and strategic directions

2. Typical Contacts

- PWRDF Director, Fundraising and Supporter Relations
- PWRDF Donor Relations Staff
- PWRDF Executive Director
- PWRDF Diocesan Representatives and other volunteers
- Provincial, diocesan and parish staff/volunteers with planned giving and other fundraising-related responsibilities
- Bishops, clergy

- PWRDF donors and potential donors
- Lawyers and financial advisors

3. Conditions under which work is performed:

- The incumbent is expected to provide his / her own office space and equipment such as a computer and printer and adhere to security protocols and oversight by PWRDF.
- Frequent periods are spent standing or sitting in the same location with some opportunity to move about.
- Need for flexibility in scheduling to respond to availability of parishes, individuals
- Travel within the Ecclesiastical Province

4. Required Experience and Skills:

- Three to five years non-profit fundraising experience, particularly in planned/legacy giving
- Proven track record in promoting various gift vehicles relevant to planned giving including bequests, insurance, securities, private foundations, etc.
- Excellent skills in diplomacy and relationship building
- Strong public relations skills
- Exceptional written and oral communication skills
- Experience in preparing compelling presentations and proposals to help secure planned and major gifts
- Experience working with fundraising databases (Donor Perfect preferred)
- Strong understanding of stewardship processes and systems
- Acceptance and adherence to Imagine Canada and AFP Ethical Fundraising Code – Code of Ethics and Accountability
- Knowledge of CRA regulations, particularly as they relate to planned giving vehicles
- General knowledge of international development issues, geography and current affairs
- Self starter with the ability to work remotely with minimal supervision

Additional Assets:

- Experience in estate planning or financial planning
- CAGP membership
- Experience in sales and/or marketing
- Familiarity with the Anglican Church of Canada including structure, organization and parish life is an asset
- CFRE credential (or working towards this)