



## Planned Giving Associate

[Shawnigan Lake School](#) is a leading independent co-educational boarding school for ages 12-18 (grades 8-12) on Canada's beautiful west coast. Our world-class facilities situated on a stunning 270-acre campus include ten boarding houses, a theatre, film lab, an observatory, salmon hatchery, rowing crew house on the lake, dance studio, state of the art Learning Commons and Library, recording studio, and robotics lab. Our diverse, inter-disciplinary and innovative programming helps shape the next generation of global leaders.

We offer a [competitive compensation package](#) and a nurturing, family-friendly workplace. This position offers a salary range of \$72,000 to \$84,000 per annum and a comprehensive benefits package. Actual salary offered will be commensurate with education, experience and internal parity

Shawnigan Lake School is committed to [safeguarding](#) and promoting the welfare of children and young people and expects all staff (and volunteers) to share this commitment. Candidates will be required to undergo child protection screening appropriate to the post, including checks with previous employers and a vulnerable sector criminal record check.

### JOB DESCRIPTION

#### PLANNED GIVING ASSOCIATE

Reporting directly to the Executive Director, Advancement & Community Engagement, the Planned Giving Associate is responsible for helping to ensure the success of Shawnigan Lake School's fundraising and development program.

The Planned Giving Associate will be responsible for advancing the mission of Shawnigan Lake School by fostering strong relationships with friends, and donors, and will generate philanthropic support from individuals, corporations, and foundations by managing a portfolio of key legacy donors and prospects.

#### ROLES AND RESPONSIBILITIES

##### *General*

- Manages a portfolio of planned giving prospects through the donor cycle utilizing principles of relationship management and personally conducts a predetermined number of one-on-one visits with prospects on a yearly basis to secure donors and funds;

- Assists in the development and implementation of cultivation, solicitation and stewardship strategies for planned giving prospects in adherence with “best call strategies”. This involves personally soliciting prospects for planned gifts (both outright and deferred), as well as providing the strategy and support for others on the Advancement team to solicit prospects to maximize the opportunities for fundraising success;
- Works in collaboration with the Advancement team to set goals and develop plans;
- Works with the Advancement team to prepare and update planned giving materials including brochures, websites, and forms;
- Moves top prospects through the donor cycle by managing them in coordination with the school's leadership team and selected volunteers. This involves preparation of strategies and briefing notes for calls and completion of call follow-up;
- Works closely with other areas of Advancement to develop donor relations plans and to maximize major and leadership planned gift opportunities;
- Develops and executes strategic plans for engaging planned giving donors and prospects through visits, calls and events to achieve the highest level of support from all donors through confirmed estate gifts and current or deferred complex types of gifts;
- Provides a timely, thoughtful and professional response to all planned giving inquiries received by phone, direct mail, emails, and surveys. Develops follow-up plans, implements relationship management strategies and timetables for both planned gift prospects and donors;
- Assists in other duties as required in furthering the goals of the Advancement team.

#### *Community Relationships*

- Ensures that all donors in the portfolio are recognized according to the school's donor recognition vehicles.

#### *Administration, and Technology*

- Ensures timely and accurate maintenance of all gifts, solicitations and donor information in Raiser's Edge database including tracking and fulfillment of pledges, donor recognition activities, and receipting and timely acknowledgement.

### **REQUIREMENTS**

- University degree or College diploma in business or equivalent planned giving experience;
- Minimum 5 years of extensive relationship building experience in a fundraising environment;
- Experience in building a planned giving program;
- Excellent communication and relationship building skills with an ability to prioritize, negotiate, and work with a variety of internal and external stakeholders;
- Excellent writing, research, communications, and presentation skills;
- Strong knowledge of Raiser's Edge fundraising database;
- Strategic thinker, attention to detail, and strong program management skills;
- Personal qualities of integrity, credibility, and dedication to the mission of Shawnigan Lake School;
- Member of CFRE and/or CAGP considered an asset;



## **NEXT STEPS**

To apply, please send a resume and cover letter specifically expressing your interest in working at Shawnigan, to the attention of Mike Wolfe, Executive Director, Advancement & Community Engagement via email at [recruitment@shawnigan.ca](mailto:recruitment@shawnigan.ca).

We ask you to please provide references at the shortlist stage of the recruitment process.

*Shawnigan Lake School is an equal opportunity employer committed to establishing an inclusive, equitable, and accessible environment for all. All qualified applicants will receive consideration for employment without regard to race, national origin, age, sex, religion, disability, sexual orientation, gender identity or expression, marital status or any other basis protected by applicable law.*

**We express our appreciation to all applicants for their interest in this position, however only candidates selected for an interview will be contacted.**

**Position closes when filled.**