

Legacy and Strategic Giving Specialist

Permanent, Full-time

At United Way of Calgary and Area, we believe that united, we make the biggest difference. We're strongest when we come together to improve local lives and communities—and when we come together as a team, we passionately propel our mission forward. We're currently looking for a Legacy and Strategic Giving Specialist to join our team.

Reporting to the Manager, Strategic Giving, the Legacy and Strategic Giving Specialist will work effectively with donors, volunteers and the business community to achieve fundraising goals. This role will be responsible for the implementation of United Way's integrated planned giving program which includes a variety of strategic giving opportunities. The Legacy & Strategic Giving Specialist will be responsible for developing and achieving financial and non-financial goals to steward and grow relationships with giving prospects for various strategic gift types and levels. This position will proactively implement exceptional relationship management, cultivation and solicitation strategies to secure, support, and build sustainable relationships and collaborate across the organization to strengthen the strategic giving opportunities.

If you are passionate about your community, aspire to make an impact, thrive in a fast-paced environment, and want to make a difference, then we're looking for you!

What you will do

- Plan, monitor, and execute an integrated planned giving program, including a focus on estate gifts, life insurance, donor advised funds, and other strategic giving opportunities.
- Develop and achieve, in conjunction with volunteer leaders, financial and non-financial goals for strategic giving opportunities, including assigned prospects and donors.
- Steward and grow relationships with giving prospects at all levels for various strategic gift types.
- Work independently and be self-motivated in initiating contacts with potential donors.
- Work in a collegial manner with the broader Resource Development team in the creation and implementation of strategies for cultivation, solicitation, and closure of present and planned gifts.
- Support, steward and create relationships with donors, volunteers, staff, and Cabinets.
- Track and take action to resolve issues/challenges promptly, both internally and externally.
- Manage and coach internal and external stakeholders through presenting educational opportunities and designing marketing material to promote planned and strategic giving goals and priorities.
- Provide verbal and non-verbal reports on assigned activities.

What you will bring

Experience:

- Bachelor's Degree in relevant field or equivalent combination of training and experience.

- Proven experience in major individual gift fundraising and in cultivating and soliciting prospects capable of five and six-figure gifts.
- Proven experience in identifying, cultivating, and soliciting donors willing to make outright and deferred financial gifts.

Attributes:

- Broad knowledge of the principles of fundraising – able to participate in all aspects of the gift cycle:
 - to initiate contacts with potential donors;
 - to develop appropriate cultivation strategies for them, including working with volunteers and Senior Leadership Team;
 - to move potential donors in an appropriate and timely fashion towards solicitation and closure;
 - to make solicitations when appropriate;
 - to maintain stewardship touch points with donors.
- Ability to develop an understanding of the needs and interests of major donors.
- Knowledge of tax laws that impact charitable giving, personal assets, and estates.
- Demonstrated leadership and ability to successfully manage multi-functional or diverse client accounts.
- Solid relationship-building skills
- Well-developed capability in Salesforce, Word, and Excel and online research
- Ability to maintain donor confidentiality in all activities at United Way of Calgary and Area and ensure compliance with privacy legislation

Work Environment

Our team values the flexibility that hybrid work offers, while also recognizing the importance of in-person collaboration. Our office is located in Calgary, and employees are expected to work in the office 2-3 days per week or as required. This balance allows us to foster a strong sense of community, facilitate teambuilding, and ensure that we continue to deliver exceptional results together, while also offering the flexibility to work remotely on other days.

United, we make the biggest difference

United Way is a not-for-profit organization that has played a vital role in our community for 85 years. As a social impact organization, our mission is clear: we mobilize communities for the common purpose of working together to create lasting social change.

In addition to meaningful work where you can have an impact, United Way also offers a comprehensive compensation and benefits package, a hybrid work environment, and flexible working hours.



Our Commitment to an Inclusive Culture

We are committed to creating an inclusive culture where everyone feels valued and respected, and that reflects the diverse community we serve. We welcome applications from all qualified candidates and encourage candidates with diverse backgrounds, experiences, styles, and abilities to apply. If you require accommodation at any stage of the hiring process, please let us know.

To Apply

Send **cover letter, resume and salary expectations** by 4:00 pm May 15, 2025, to hr@calgaryunitedway.org

Subject Line: Legacy and Strategic Giving Specialist - Your Name.

To learn more about the United Way of Calgary and the Area, please visit our website at www.calgaryunitedway.org.

We thank all applicants for their interest and effort in applying for this position, however, only those being considered will be contacted.