



**Job Title:** Legacy Giving Officer  
**Reports to:** Chief Philanthropy Officer  
**Status:** Full-time (exempt)

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## ABOUT HORIZONS FOUNDATION

[Horizons Foundation](#) has been dedicated to serving, funding, and helping to lead the LGBTQ community for 45 years. Established in 1980 as a San Francisco–based community foundation, Horizons’ mission statement reads:

*As the world’s first community foundation of, by and for LGBTQ people, Horizons invests in LGBTQ nonprofits, strengthens a culture of LGBTQ giving, and builds a permanent endowment to secure our community’s future for generations to come.*

Horizons is a national leader in promoting LGBTQ philanthropy, recently recognized as one of the LGBTQ movement’s “Top 10” funders by the national advocacy group Funders for LGBTQ Issues. Last year, Horizons distributed more than \$7 million in grants to hundreds of nonprofits throughout the country, with more than half supporting organizations in the Bay Area. Grants were awarded to LGBTQ nonprofits and to LGBTQ-focused programs at non-LGBTQ-specific organizations. Through its donor-advised fund (DAF) program, Horizons also makes grants to non-LGBTQ nonprofits regionally and nationally.

Horizons has long prioritized grantmaking to frequently marginalized members of the LGBTQ community, including LGBTQ communities of color, transgender people, LGBTQ refugees and immigrants, LGBTQ youth and elders, and those with least access to vital services and equal justice. The foundation also has a deep commitment to smaller, grassroots nonprofits and a long record of awarding very early funding to promising nonprofits.

In addition to grantmaking, the foundation offers educational, community-building, and other events for donors and grantee partners throughout the year and is host to one of the LGBTQ community’s best-known annual galas. Horizons also has a powerful vision for the future support of the Bay Area LGBTQ community, one in which the legacy (planned) gifts of LGBTQ people provide the resources that future generations will need to secure and defend their rights, take care of LGBTQ people in need, and celebrate our lives through culture and the arts.

## POSITION SUMMARY

The Horizons Foundation Legacy Giving Officer (“LGO”) is a new position created to enable Horizons and the LGBTQ community to realize the immense potential in LGBTQ legacy giving. Legacy giving is one prong in a multi-part development program that includes: Annual Giving, Major Gifts, DAF management, and events. The various aspects of fundraising at Horizons Foundation work together to build relationships with donors that help them maximize their full philanthropic potential.

In partnership with the Chief Philanthropy Officer and the development team, the LGO is responsible for all aspects of Horizons' legacy giving program, including strategy development, legacy donor solicitation, stewardship of existing legacy donors, prospect identification, leveraging volunteer/peer resources, partnerships with estate planning attorneys and financial advisors to donors, and use of appropriate data resources to ensure a targeted and effective program. The LGO will also work closely with the communications team in raising the visibility of LGBTQ legacy giving in the LGBTQ community. In addition, the LGO will lead implementation of the National LGBTQ Legacy Giving Initiative (NLLGI), an unprecedented effort to develop the potential in LGBTQ legacy giving nationwide.

**PRINCIPAL RESPONSIBILITIES** (*% FTE notes are estimates only*)

- 1) Working with the Chief Philanthropy Officer, refine Horizons' overall legacy giving strategy and create a comprehensive legacy program. (10% FTE)
- 2) Increase the number and size of legacy gifts for Horizons Foundation from the foundation's existing donors and contacts. (45% FTE)
  - Systematically identify prospects among Horizons' existing donors and prioritize donors for solicitations
  - Develop and implement individualized, donor-by-donor strategies to secure new legacy commitments through solicitations by foundation staff and volunteers making peer-to-peer asks
  - Draft gift agreements between Horizons and legacy donors
  - Coordinate legacy efforts with department-wide strategies and solicitations for annual support by working closely with the Chief Philanthropy Officer and the development team
- 3) Actively and systematically steward members of the foundation's legacy circle to strengthen their commitments to Horizons and increase the likelihood of larger gifts. (10% FTE)
  - Create and implement comprehensive legacy stewardship program
  - In partnership with Horizons' Events Manager, provide opportunities for current and prospective legacy donors to connect with one another and be recognized for their philanthropy
- 4) Deepen Horizons' connections with estate planning attorneys and financial advisors who work with the LGBTQ community. (10% FTE)
- 5) With communications team, create compelling messages, digital assets, and collateral to promote legacy giving to Horizons among existing networks and in wider LGBTQ community. (10% FTE)
- 6) Respond to legacy-related inquiries from donors, prospects, and their advisors.
- 7) Direct and implement the National LGBTQ Legacy Giving Initiative. (15% FTE)
  - Co-lead and then lead a handful of webinars for cohort organizations (over two years)
  - "Touch-base" type meetings three times a year with the 12 cohort organizations
  - *Possibly*: lead development of one in-person retreat (funding permitting)
- 8) Working with the Development Support Administrator, ensure that all donor legacy records are complete and accurate.

9) Other duties as needed or assigned.

## **DESIRED QUALIFICATIONS**

### **Experience:**

- Minimum of five years of experience in individual and major gift fundraising, or comparable role
- Demonstrated success in development activity and managing donor relationships
- Experience in developing and implementing moves management plans
- Proven ability to develop, manage, and execute complex project management
- Experience with donor-advised funds (DAFs) and legacy giving programs
- Knowledge of fundraising software and CRM systems, preferably Salesforce
- Familiarity with the Bay Area LGBTQ+ Community, local philanthropic community, donor networks, and relevant professional networks

### **Attributes, Skills and Competencies:**

- Commitment and passion for the mission and values of the Horizons Foundation
- Excellent verbal and written communication skills
- Strong interpersonal skills with the ability to build and maintain relationships with donors, board members, and colleagues
- Strategic thinker with the ability to develop and implement effective fundraising strategies
- High level of organizational and project management skills
- Unwavering attention to detail
- Ability to work both independently and collaboratively in a team environment

Horizons will also consider exceptional candidates with relevant skills and a strong record of high achievement.

## **COMPENSATION, HOURS, AND OFFICE**

This is a full-time salaried position. The full salary range for this position is \$110,000 - \$125,000, commensurate with qualifications and experience. The starting salary is generally at or near the mid-point of the salary range, with the opportunity for future growth. In addition to federal and other paid holidays, Horizons' current practice is to offer staff an additional day off on the last Friday of the month. The generous benefits package includes full health, vision and dental coverage, vacation, sick leave, up to 8% employer contribution to a 403(b)-retirement plan, and the pride of working at a critical community institution. Occasional evening and weekend work hours are required at various times throughout the year, in particular supporting Horizons' annual and quarterly events, and participating in grantee and community events.

Horizons' current practice is for staff to work from the foundation's downtown San Francisco office on Tuesdays, Wednesdays, and Thursdays. All staff are expected to observe these in-office days. Mondays and Fridays can be remote-work days. The foundation office is conveniently located 1.5 blocks from the Montgomery BART/MUNI station.

## PHYSICAL REQUIREMENTS

The physical demands of this position are light with the expectation that the staff person can exert up to 20lbs. of force occasionally, and/or up to 10 lbs. of force frequently, and/or a negligible amount of force constantly to move objects. Light work usually requires walking or standing to a significant degree. The position requires frequent computer use at a workstation. Horizons Foundation will make reasonable accommodations in compliance with the ADA of 1990. This job description and its physical requirements will be reviewed periodically as duties and responsibilities change with business necessity. Essential and marginal job functions are subject to modification.

## EQUAL OPPORTUNITY

Horizons Foundation is an equal opportunity employer that supports and lives diversity in our staffing and values. We actively seek and welcome applications from people who identify as people of color; women; transgender, gender non-conforming, and non-binary people; LGBTQ people; and people living with disabilities. We comply with all applicable federal, state, and local laws governing nondiscrimination in employment, and encourage and seek qualified candidates of all backgrounds.

## APPLICATION PROCESS

To apply, please submit a cover letter and your resume, preferably **in a single PDF**, to [careers@horizonsfoundation.org](mailto:careers@horizonsfoundation.org) with **Legacy Giving Officer** in the subject line. Incomplete applications will not be considered. Applications will be accepted until the ideal candidate is identified. Interested but not sure you meet all the qualifications? Please feel free to submit an application and make the case of why your experience is transferable for this role. **Early submissions are encouraged** and will be reviewed as they are submitted. No phone calls, please.

Thank you for your interest in Horizons and your support for the LGBTQ community.