

Job Description: Planned Giving Officer

Do you see yourself in an organization which plays a key role in caring for generations of families? Do you thrive in a setting where strategy, fundraising, business plan execution and team work frame your day to day activities? Are you a 'roll-up-your-sleeves-and-get-it-done' type of person whose work ultimately drives the success of an entire organization? Do you want to work on team who makes a difference to the lives of over half a million Torontonians?

If you said yes to these, then North York General Foundation wants you.

About North York General Foundation

Constantly redefining what it means to be a 'community hospital', North York General is a multi-site acute, ambulatory and long term care network for our diverse community, an incubator for applied research, an innovation spring board in the health care landscape and destination for philanthropy. At North York General Foundation, our team of creative and dedicated professionals support raising and stewarding funds for our incredible Hospital. Building on the success of our \$150 M 'Campaign for North York General', we are driving towards the future, planning and investing in programs and infrastructure that will transform how our Hospital delivers exceptional care to our growing community.

Description of the position

The Planned Giving Officer is responsible for connecting with individuals (donors, prospects, professional advisors and colleagues) to identify, cultivate, solicit and steward current and future gifts using gift planning vehicles.

Reporting to the Vice President, Philanthropy, the Planned Giving Officer will be responsible for the strategy and execution of the Foundation's Planned Giving program, a pivotal contribution to the long term support required to meet Foundation and Campaign goals. The Officer will work in collaboration with the Development Team to execute sector-leading Planned Giving Program that inspires donors to invest in North York General.

Key Responsibilities:

- Work cross functionally amongst all teams to identify and diversify funding resources to create new Planned Giving prospects
- Manage all aspects of the gift cycle for the portfolio of Planned Giving prospects and donors with heightened attention to donor recognition
- Manage the estate portfolio including tracking, scheduling and reporting on the status of estates under administration

- Effective management of long term financial planning professionals including estate trustees, lawyers and family members to ensure smooth and timely execution of estate plans
- Proactive engagement with experts in the insurance and investment sectors to identify new opportunities for NYGF and to bring planned giving options forward to prospects
- In collaboration with the Development team, plan and organize cultivation events for prospective donors
- Attend and participate at various Foundation recognition and fundraising events
- Actively manage a portfolio of current donors and prospects. Complete cold calling, and donor visits to cultivate, solicit and steward and provide ongoing relationship management to donor and update progress in the Foundations donor database
- Supports and executes annual mini-campaigns to acquire current planned and outright gifts within specific target areas
- Supports and execute marketing activities in conjunction with Marketing & Communications
- Support strategy for the stewardship and continued cultivation of existing planned giving donors and members of the Heritage Circle, in conjunction with the Stewardship & Donor Relations team
- Act as internal resource on Gift & Estate Planning for other Foundation staff and Volunteers
- Consult with professional advisors with respect to Gift & Estate Planning issues for the Foundation and their clients and
- Ensure data integrity of team information in the donor database and maintain activity reports

Qualifications

- A bachelor's degree or higher, plus 3 to 5 years' experience in fundraising with focus on Gift & Estate Planning preferred
- Proven track record soliciting and closing planned gifts as well as outright current gifts
- Able to work in a fast paced environment, prioritize and multi task
- A go-getter, team player and relationship builder
- Ability to think strategically and work independently in driving new initiatives or enhancing existing programs
- Creative, resourceful, cost-efficient and intuitively driven
- Ability to build new and long-term relationships with prospects, donors, and senior level volunteers
- Experience with Raiser's Edge or relational databases an asset, ensuring appropriate prospect/donor documentation
- Superior verbal and written communication skills, including public speaking
- Organized, detailed oriented, with strong follow through
- Excellent computer skills (Microsoft Office)

We offer a comprehensive compensation/benefits package, a professional working environment, and an opportunity to grow with an organization that has been recognized as the employer of choice in the not-for-profit sector.



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To apply for this role please forward your CV and Cover Letter to FoundationCareers@nygh.on.ca by February 28th, 2019 at 4pm. Please reference “Planned Giving Officer” in the subject line.