



Job Description

Planned Giving & Estates Officer Hamilton Health Sciences Foundation

Background

Hamilton Health Sciences Foundation (HHSF) is a registered charitable organization that exists to support patient care, research and education across the Hamilton Health Sciences family of hospitals and cancer centre (Ron Joyce Children's Health Centre (RJCHC), Hamilton General, Juravinski Hospital and Cancer Centre, McMaster Children's Hospital, McMaster University Medical Centre (MUMC) and St. Peter's Hospital.

HHSF is committed to a values-based work environment that is characterized by:

- Caring:** by our pursuit of a donor centered fundraising environment and the team environment in which we work
- Respect:** for our donors our volunteers and each other
- Innovation:** by our celebration of new ideas and challenges
- Accountability:** by our transparency as a corporate entity and our commitment to meet the needs of our partner hospital.

HHSF is committed to the Donor Bill of Rights and to being a donor-centered organization. All members of the HHS Foundation Staff Team support development activities by ensuring the maintenance of accurate records of information on the Raisers Edge database. HHSF is committed to protecting the privacy of our donors and prospects.

Working within this value system the duties of the **Planned Giving & Estates Officer** will include but not be limited to the description that follows.

Position Summary:

Reporting to the VP of Development and Planned Giving, the **Planned Giving & Estates Officer** is a key member of the Hamilton Health Sciences Foundation development team, providing fundraising expertise to benefit our mission. This role champions private sector support with a focus on relationships with individual donors who have a propensity to make a planned gift to HHSF in their will or through other planned giving instruments such as life insurance, trusts, and so on. The position is also responsible for administration of estates gifts and relationships with executors, family members, lawyers, trust and insurance companies and others involved in gifts of bequests, trusts, life insurance and other estate gifts.

A dedicated fundraising professional, the Planned Giving Officer proactively manages an assigned portfolio of individual donors and is responsible for building strong and productive relationships to maximize revenue generation opportunities through both estate and current gifts. This position is also responsible to coordinate activities with partners such as allied profession volunteers, consultants and service providers affiliated with the Planned Giving Program. This position is required to function independently, exercising a considerable amount of initiative, innovation and resourcefulness to achieve strategic and impactful outcomes to realize the Foundation's goals.

Specific responsibilities include, but may not be limited to:

Fundraising & Relationship Management (80%)

- Champion our mission with regional community to identify and cultivate new opportunities to support our revenue generation goals
- In consultation with VP, Development, manage an assigned portfolio of donors to build engaged relationships that will yield longer term benefits
- Work collaboratively with the HHSF staff team in the area of planned giving to ensure a seamless and donor-centred experience, internally and externally
- Ensure prompt response to all internal and external inquiries and facilitate processes according to HHSF policies and protocol
- Work to achieve fundraising results that meet annual expectations for assigned portfolio of donors and prospects
- Coordinate activities and meetings of the Gift Planning Services Committee
- With a focus on planned gifts; engage, cultivate, solicit and steward prospects to support a culture of donors who feel connected, valued and informed
- Proactively build prospect pipeline through contacts identified from portfolio, HHSF staff, grateful patient, donors and volunteers
- Develop effective relationships with key stakeholders to enhance their engagement with HHSF
- Prepare compelling and strategic fundraising materials including, but not limited to, briefing notes, proposals, letters, reports, acknowledgements, speaking notes and impact updates
- Maintain donor and prospect records including: entering and maintaining solicitation and donor information, call reports, up to date address and key contact information
- Ensure the tracking and fulfillment of pledges, donor recognition activities, receipting and timely acknowledgement
- Undertake prospect research, when required and apply for prospect clearance.
- Organize and coordinate cultivation and stewardship activities such as meetings, tours and events
- Provide and present information to groups to increase engagement with Foundation's mission, vision and goals and speak with confidence about need and impact to prospective and current donor groups
- Attend and participate, as required, the Signature events of the Foundation
- Other projects, as appropriate

Estate Administration (20%)

- Establish and keep up to date both electronic and hard copy records: review of legal paperwork-direct, residue, conditional bequests; both written and verbal correspondence with lawyers and Estate representatives at notification (acknowledgement), distribution (releases, accounts) and fulfilment (recognition); and follow established HHSF process for bequests
- Update and monitor financial records for received and future gifts. Produce quarterly reports as well as financial projections for Business Planning.
- Provide stewardship updates for Estate representatives around impact and at times personalized recognition.
- Work closely with Chief Operating Officer (COO) and VP Development and Planned Giving on key Estate administration requirements as well as communicate with Foundation staff around bequests requirements, stipulations and restrictions.
- Develop and maintain close working relationships with Allied Professionals in region.
- Monitor the process for each estate and correspond with Estate representatives around the status.
- Keep up to date with amendments to Estate law and the impact that they may have on the charitable bequest giving.

Relationships:

Accountability: **Direct:** COO, VP Development and Planned Giving

Functional Relationships:

- HHSF Staff
- Volunteers
- Hospital Staff

Candidate Qualifications

Education/Experience:

- Post-secondary education in business, finance, law, communications or related field
- Certificate in development, fundraising or volunteer management an asset
- Qualifications and experience in gift planning, financial planning, estate law, tax advice an asset
- 3+ years of experience, with demonstrated success, in the non-profit/charitable sector.

Knowledge, Skill, Abilities:

- Demonstrated excellent communication skills (verbal and written), interpersonal, and problem solving skills
- Understanding of concepts of planned giving, such as estate planning, gifts by will, life insurance, etc.
- Act as an ambassador throughout the community, positively representing the Foundation
- Ability to speak comfortably with donors about financial and end-of-life issues such as estate planning, legacy, powers of attorney, and so on
- Demonstrated superior organization, flexibility, and multi-tasking skills within a team environment
- High degree of initiative and ability to manage multiple tasks and prioritize tasks in a positive and effective manner, meeting critical deadlines
- Ability to analyze results and make appropriate adjustments and recommendations
- Ability to manage relationships and motivate others to accomplish specific tasks
- Demonstrated commitment to the highest standards of ethical practice
- Outgoing, positive, confident professional with a warm disposition
- Ability to condense and package information in a visually appealing and logical manner
- Understand the need for professionalism, discretion and patience when communicating with donors and volunteers
- Accuracy and attention to detail is imperative
- Proficient keyboarding skills and proven in-depth knowledge of Microsoft Office Suite
- Experience with Raiser's Edge/NXT fundraising software an asset
- Experience using social media platforms including facebook, twitter and instagram an asset

Working Conditions:

- Travel is required; the incumbent must possess a valid driver's license and have use of a car.
- The nature of the work is such that evening and some weekend work is required
- A Vulnerable Persons Police Check is a requirement of employment.

Interested applicants please submit your application to Naoka Feth at feth@hsc.ca

HHSF is an equal opportunity employer and will accommodate any needs under the Canadian Charter of Rights and Freedom, Accessibility for Ontarians with Disabilities Act and the Ontario Human Rights Code. Hiring processes will be modified to remove barriers to accommodate those with disabilities, if requested. Should any applicant require accommodation through the application process, please contact

Naoka Feth (905.521.2100 x 44249 or feth@hhsc.ca) for assistance. If the applicant requires a specific accommodation because of a disability during the interview, the applicant will need to advise Naoka Feth when scheduling the interview and the appropriate accommodations can be made.

We would like to thank all who apply, but only those selected for an interview will be contacted.

Deadline date for receipt of applications is **Monday, May 10th, 2021.**