

Manager, Legacy Giving Full Time Permanent

Hamilton Health Sciences Foundation provides vital funding to enable the best possible patient care. We inspire and motivate gifts that fund medical equipment and patient amenities, innovative research initiatives, essential redevelopment of clinical care spaces, and the education and training of health care providers.

As a registered charitable organization, we proudly support patients and families across south-central Ontario, and from outside the region, who receive specialized care at Hamilton Health Sciences including Hamilton General Hospital, Juravinski Hospital and Cancer Centre, McMaster Children's Hospital, and St. Peter's Hospital. The associated programs at the Regional Rehabilitation Centre, McMaster University Medical Centre and Ron Joyce Children's Health Centre are also included. The Foundation is committed to the Donor Bill of Rights and to being a donor-centered organization. All members of The Foundation's staff team support development activities by ensuring the maintenance of accurate records of information on the Raisers Edge database. Hamilton Health Sciences Foundation is committed to protecting the privacy of our donors and prospects.

This is an exciting time to join Hamilton Health Sciences Foundation as we build upon a strong foundation of our Culture Code that includes the values of respect, impactful and inspiring. We believe that relationships and partnerships are the basis of excellence in fundraising and have a vision to see a community of inspired and committed donors who embrace ***It's Vital to Care***. Every position in The Foundation contributes to a safe, inclusive environment for all through compliance with The Foundation's diversity, equity and inclusion philosophy and patient and staff safety policies and procedures.

Position Summary:

Reporting to the Vice President, Development, the ***Manager, Legacy Giving*** champions private sector support with a focus on relationships with individual donors who have a propensity to make a planned gift to The Foundation in their will or through other planned giving instruments such as life insurance or trusts.

As the lead and champion for Legacy Giving, the Manager will work closely with colleagues across The Foundation on approaches and opportunities that build awareness and inspire donor support. The Manager will work closely with Development teams as a mentor and strategist to incorporate planned giving as a part of ongoing donor discussions. Across the matrix of the organization, this role will collaborate with the Annual Giving Program to create synergies for both programs as well as the Marketing and Communications team to promote and market Legacy Giving.

As dedicated fundraising professional, the Manager, Legacy Giving proactively manages an assigned portfolio of donors and is responsible for building strong and productive relationships to maximize revenue generation opportunities through both future planned and current gifts.

This role is also responsible to coordinate activities with partners such as allied professionals, volunteers, consultants and service providers affiliated with Legacy Giving and 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

- Develop and manage an assigned portfolio of prospective and planned giving donors through the donor cycle to build engaged relationships that will yield longer term benefits
- Proactively build a prospect pipeline through contacts identified from portfolio, The Foundation staff, grateful patient, donors and volunteers
- Work collaboratively with internal staff in the area of Legacy Giving to ensure a seamless and donor-centered experience, internally and externally
- Ensure prompt response to all internal and external inquiries and facilitate processes according to The Foundation policies and protocol
- Work to achieve fundraising results that meet annual expectations for assigned portfolio of donors and prospects
- 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
- Working in collaboration with VP, Finance and the Corporate Services team, 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

Legacy Giving

- Collaboratively establish and implement the Legacy Giving's objectives and annual goals, including business planning and associated budgets. Ensure strategies are integrated and aligned with The Foundation's vision, purpose, values and strategic directions.
- Measure, monitor and manage the overall performance of the program against performance targets
- Coach and motivate staff and volunteers to achieve program objectives and goals
- Set the stewardship strategy for the Legacy Circle (confirmed planned giving donor society) and accountable for its implementation and execution
- Provide strategic direction to interdepartmental colleagues on targeted donor and prospect communications, recognition and stewardship activities
- Review and coordinate appropriate partnership programs such as Donor Motivation, Will Power, Canadian Association of Gift Planners, etc.
- Work in collaboration with the Marketing and Communications team to strategically market the Legacy Giving Program in the south-central Ontario market
- Coordinate activities and meetings of the Gift Planning Services Committee; prepare agenda's, take minutes and prepare materials
- Build and maintain relationships with allied professionals (i.e. financial advisors, lawyers, and accountants)
- Act as an ambassador throughout the community, positively representing the Foundation
- Other projects, as appropriate.

Relationships:

Accountability: **Direct:** Vice President, Development

Functional Relationships:

- HHSF Leadership and Staff Teams
- Community and Volunteers
- Hospital Staff
- Community and program partners and allied professionals

Candidate Qualifications**Education/Experience:**

- Post-secondary education
- Certificate in development, fundraising or volunteer management an asset
- Qualifications and experience in financial planning, law, tax advice an asset
- Progressive experience and a successful track record in a gift planning, major gift, or fundraising role in settings of significant complexity.
- Strong knowledge of gift and estate planning and exposure to and experience with major gift fundraising and donors.
- Experience integrating legacy giving strategies across multiple revenue channels.

Knowledge, Skill, Abilities:

- Demonstrate excellent communication skills (verbal and written), interpersonal, and problem solving skills
- Ability to speak comfortably with donors about financial and end-of-life issues such as estate planning, legacy, powers of attorney, etc.
- Demonstrate 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 productive relationships and motivate others to accomplish specific tasks
- Demonstrated commitment to the highest standards of ethical practice
- Strong relationship building skills to cultivate and maintain positive donor, prospect, community, and external partnership relationships 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
- Strong computer skills in utilizing Microsoft Office program (Excel, Word, PowerPoint, Outlook), data entry into and reporting from database system, and chat and video conferencing programs
- Experience with Raiser's Edge/NXT fundraising software an asset
- Experience using social media platforms including Facebook, Twitter and Instagram an asset

Office Location:

- Location of work is 1 King St. West, Hamilton ON and the Foundation will follow all public health guidelines with respect to COVID-19. Remote and Flex may be accommodated after three months of employment based on approval of VP.

Working Conditions:

- Travel is required; the incumbent must possess a valid driver's license and have use of a reliable vehicle as the position will visit various Hamilton Health Sciences sites, patient locations, Foundation events, and others.
- The nature of the work is such that early morning, evening and some weekend work is required.
- A Vulnerable Persons Police Check is a requirement of employment.
- Proof of full COVID vaccination is mandatory for employment with Hamilton Health Sciences Foundation in accordance with policy.

Salary Range:

The salary range for this position is between \$65,000 and \$75,000, commensurate with experience. The Foundation provides a competitive benefit package and pension plan (HOOPP).

How to Apply: Please submit your resume and cover letter to HHSFcareers@hhsc.ca with the job title in the subject line. Applications will be reviewed and invited for next stages of the recruitment process, as received. We would like to thank all who apply, but only those selected to move forward will be contacted.

The Hamilton Health Sciences Foundation is an inclusive and equal opportunity employer. Our commitment to diversity, equity and inclusion within HHSF reflects a belief that we will make the greatest impact to our mission when everyone can genuinely and fully participate without barriers or exclusion. We are dedicated to creating a workplace reflective of the community we live, work and serve and welcome applications from diverse and equity-deserving groups.

The Foundation is committed to providing a barrier-free recruitment process and work environment. Accommodation, if requested, will be provided throughout the recruitment process in accordance with the Canadian Charter of Rights and Freedom, Accessibility for Ontarians with Disabilities Act and the Ontario Human Rights Code. Should any candidate require accommodation in any phase of the recruitment process, please contact Heather Slye (905.521.2100 x 44624 or HHSFcareers@hhsc.ca) for assistance.