



**Title: Manager, Planned Giving**

**Status: Full time**

**Reports to: VP, Development**

St. Joseph's Health Centre Foundation is an innovative fundraising organization committed to connecting with our west end community and supporting St. Joseph's Health Centre's Promise to look after the unique health needs of this wonderful community of half a million. This Promise is rooted in a century-long tradition of community care that was the mission of our founding Sisters of St. Joseph when they first opened our doors in 1921. As we lead up to our 100<sup>th</sup> Anniversary in 2021, we are renewing our Promise to the west end with a commitment to meeting the care needs of this community.

We have grown in recent years to be a leading community hospital foundation with a strong and engaged board of directors. Last year, we announced reaching a milestone of \$100M raised in our Promise campaign. We are looking for a new member for our team to work closely with our neighbours in support of St. Joe's. Gifts to the Foundation help the Health Centre create new spaces, modernize facilities and buy new equipment.

Planned giving is one of the key growth areas for the Foundation and we are looking for a leader in this area to build and grow a best in class legacy giving program in support of St. Joe's. Our community is our greatest asset and we are looking for someone who knows the west end well. Ideally someone who lives or has lived in our community and is looking to support St. Joe's as an organization that is a pillar in our community, and, ideally, is close to their heart.

If you feel that you would be a great fit for this position, we invite you to apply by Wednesday, September 23<sup>rd</sup> at 5:00pm via the Unity Health website: <https://unityhealth.to/careers/>

**The Position:**

The Manager, Planned Giving is responsible for driving one of the Foundation's growing fundraising priorities - legacy giving, while maintaining a portfolio of intermediate and major gift donors. The candidate is a strategic thinker and established fundraiser who likes a challenge and looks for opportunities to work with others to achieve measureable results.

The Manager, Planned Giving will be responsible for building a strong and successful revenue stream in our community through planned giving, with success measured through increasing the number of expectancies, as well as annual donations from planned giving and other donors.

The successful candidate possesses a strong record of success over the last five-plus years and has knowledge of our west end community. S/he will enjoy dealing with people and will spend at least 50% of her or his time speaking with donors, potential donors and groups in the community to increase the Planned Giving donor pool, as well as intermediate and major gift commitments.

S/he will manage and grow our network of advisors and will work closely with the volunteer leaders who support the program through our Promise Legacy Council. Responsible for project and process development, as well as direct donor work, the candidate displays compassion, mature judgment, superior diplomatic, and highly developed listening skills. Committed to working as part of an integrated fundraising operation, the successful candidate will be a leader in a dynamic and growing organization focused on delivering increasingly strong results.

The candidate could be a fundraiser from the charitable sector or someone with a background in working with clients to meet their financial needs. Allied professional experience is welcome.

The Manager, Planned Giving is part of the major giving team and reports to the Foundation Vice President, Development. S/he works closely with other members of the Foundation team and with members of the board of directors and provides planned giving expertise and support to both staff and volunteers.

The position requires the following:

- Knowledge of gift acceptance policies, life insurance and estate expertise
- Ability to synthesize and summarize a lot of information, track and manage multiple deadlines, work independently and reliably and be productive and efficient
- Experience submitting necessary communications, recognition and stewardship policies, and developing marketing materials to effectively support the portfolio
- A positive attitude
- Strong organizational skills and professional demeanour
- A commitment to teamwork
- Strong interpersonal skills and judgment
- Demonstrated ability to maintain confidential and privileged information with discretion
- Demonstrated ability to facilitate the completion of a variety of gifts (intermediate and major gifts, bequests, life insurance, annuities, charitable remainder trusts, etc.)
- Excellent verbal and written communication skills
- Ability to manage multiple tasks simultaneously
- Demonstrated ability to move projects forward according to timeline
- Ability to work with groups/teams
- Self-starter with ability to work independently
- Excellent knowledge of all MS Office applications

- Relevant donor software/database experience (such as Raisers Edge)
- Strong team player with a good sense of humour and ability to have fun
- University or college degree required

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Applications will be reviewed on an ongoing basis before the application deadline closes.

We thank all applicants for applying, however, only qualified candidates selected for an interview will be contacted.