

Manager, Personal and Planned Giving

Who We Are

The IWK Foundation is a champion of excellence in women's and children's health and medicine and works in partnership with the IWK Health Centre to support their vision of providing quality care to women, children, youth and families in the Maritime Provinces and beyond. Our donors are passionately committed to making a difference for Maritime families, contributing more than \$13 million in support of the most urgent care priorities at the IWK last year.

We believe in and are committed to the principle of equal opportunity in our employment practices and in providing an environment free from harassment and discrimination for all employees.

What We Need

Manager. Leader. Innovator. Disruptor. Empathy. Visionary. Strategic Thinker. Relationship Developer. Sales Focus. If these are words that describe you, please keep reading.

We need a seasoned, talented individual to join our team who will help develop, lead, manage and maintain our Personal and Planned Giving portfolio to provide maximum annual revenue for the IWK Foundation. Reporting to the Senior Director of Philanthropy, the person best suited for this position is one who thrives in the world of developing and maintaining lasting relationships with our donors but understands that every story behind each gift is unique and deserves the best, nothing less in how we honour their gift.

To do this, you will:

- In partnership with the Philanthropy and leadership team, lead the planning, implementation, and management of the Personal & Planned Gifts portfolio as it aligns with business goals of the organization
- Manage, mentor and coach and counsel Personal & Planned Gifts team members to ensure workflow from the department is accurate, timely, consistent and aligned with overall organizational goals
- Develop, implement, and oversee systems for team's professional development, process documentation, progress tracking/moves management, and metrics
- Provide first contact with donors, professional advisors and others seeking information regarding legacy giving
- Work to ensure forecasting, recognition and allocation of legacy gifts to reflect the donor's intent and needs of the IWK Health Centre
- Devise strategies for increasing planned giving donors, including appraising and testing new & innovative fundraising techniques
- Provide direction and insights into development of annual marketing program for Planned Giving
- Develop, contribute, and/or supervise marketing materials and communications for the planned giving program, including planned giving newsletter, cultivation letters, donor stories, donor quotes, and other promotions as needed
- Lead Planned Giving portfolio and accountable for delivering on annual revenue budget targets
- Confirm annual target of new expectancies for future funding
- Facilitate gift agreements
- Develop and manage expense budget to support revenue generation
- Manage estate processing with lawyers and financial institution
- Oversee preparation and filing of required estate documents and ensure all information is current and accurate
- Execute on all phases of the donor journey – identification, qualification, cultivation, solicitation & stewardship- to foster long term relationships
- Actively spend time prospecting and facilitating cold calls to identify potential future donors

- Define case requirements for customized proposals and funding requests to align with donor interests and funding goals
- Participate in the planning and implementation of project related donor events and activities to engage and educate donors and prospects and effectively steward donors
- Meet activity targets set each fiscal year to ensure proper planning to reach revenue targets including phone, email and face to face visits subject to COVID-19 safety protocols
- Prepare and update annual budgets related to Planned Giving portfolio
- Report on monthly revenue for Planned Giving portfolio (actual against projection)

If you are interested, ask yourself...

- Do I have 5+ years' experience in senior strategic fundraising roles or estate/financial planning?
- Do I have intermediate accounting skills with ability to review and approve estate accounting?
- Do I have discretion to handle sensitive and confidential information?
- Do I have knowledge of current and evolving trends in planned giving fundraising?
- Do I have excellent verbal and written communication skills?
- Do I possess the skills needed to sell emotion?
- Do I have experience in budget planning and preparing financial reports?

If you say yes, then....we may want to speak further with you.

If this position speaks to you and you are excited about the possibility of joining one of the most dynamic and entrepreneurial nonprofits in the business, we want to hear from you. Please provide your cover letter outlining your "WHY", along with your resume and salary expectations to jeff.hunter@iwk.nshealth.ca by March 12, 2021.

While all applications will be reviewed, only successful candidates will be contacted for an interview.