



## **SENIOR LEGACY GIVING OFFICER (contract position) Hamilton Health Sciences Foundation**

### **Background**

Hamilton Health Sciences Foundation 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 (Chedoke, Hamilton General, Henderson General, Juravinski Cancer Centre, McMaster Children's Hospital, McMaster University Medical Centre and St. Peter's Hospital).

Hamilton Health Sciences Foundation (HHSF) is a charitable organization raising funds to support the health care programs and services of the Hamilton Health Sciences (HHS).

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 Raiser's Edge database. HHSF is committed to protecting the privacy of our donors and prospects.

### **Position Summary**

Reporting to the Vice-President, Integrated Planned Giving, the Senior Legacy Giving Officer is responsible for working with the foundation's staff team for St. Peter's Hospital and McMaster Children's Hospital to implement and grow a Legacy Giving program that will significantly increase annual and future support for the family of hospitals and a cancer centre.

The Senior Legacy Giving Officer works closely with another Senior Legacy Giving Officer to ensure the annual business and fundraising plan is executed successfully. Core program responsibilities are shared by both officers.

The most important aspect of the job is to develop new and foster ongoing relationships with individuals identified as significant or potentially significant donors and their advisors.

Specific responsibilities include, but may not be limited to:

1. Develop and maintain personal contact with portfolio of prospects for leadership and legacy gifts.
2. Meet individually with prospective donors, provide opportunities for giving including estate planning and bequests and solicit both outright and deferred gifts.
3. Coordinate activities with donor's attorney and/or financial advisor to determine the most appropriate method of deferred giving and ensure necessary arrangements for collection of gifts.
4. Implement a Marketing Plan to promote Legacy Giving as presented to all prospects and donors, and/or their advisors by utilizing available medium such as newsletters, letters, brochures, presentations, as well as telephone calls and personal visits.

5. Ensure that requests for information from donors or prospects are addressed quickly, accurately and all pertinent information is recorded appropriately in Raiser's Edge.
6. Provide support to the Legacy Advisory Committee and ensure that all members are actively engaged in the Foundation's development.
7. Ensure that all legacy gifts are received in accordance with Foundation policy and procedures.
8. Assist in coordinating events and functions related to legacy giving in a professional fashion.
9. Maintain and provide timely and accurate reports on bequest expectancies and receipted gifts to the Vice President, Integrated Planned Giving as required.
10. Actively participate in external associations and programs related to the legacy giving function as appropriate and required.
11. Keep abreast of legislation pertaining to Estate and Planned Giving.
12. Assist the Vice President, Integrated Planned Giving with special projects and assignments.

## Relationships

### *Accountability:*

- **Direct:** Vice President, Integrated Planned Giving
- **Indirect:** Vice President, Development, McMaster Children's Hospital (MCH), President & CEO, HHSF

### *Functional Relationships:*

- Senior Legacy Giving Officer, CVS/JCC
- Development Co-ordinators, (MCH, SPH)
- Members, MCH and SPH Fundraising Councils
- HHSF Finance Team
- HHSF Communications Team
- Staff and Physicians at McMaster Children's Hospital and St. Peter's Hospital

## Candidate Qualifications

- Demonstrated track record of achievement, most particularly related to planned giving
- 5+ years relevant, progressive experience in fundraising, including planned giving
- University degree (or equivalent), formal Planned Giving training
- Working towards Certified Fund Raising Executive (CFRE), designation is an asset
- Actively involved with Canadian Association of Gift Planners (CAGP) is an asset
- Excellent writing and computer skills
- Strong interpersonal and collaborative skills
- Ability to work in the Raiser's Edge database
- Strong organizational capabilities, ability to multi task, the highest standards of responsibility; follows up to ensure satisfaction of commitments

Please submit your resume and letter of interest to:

J. Battista, Development Co-ordinator

[battista@hpsc.ca](mailto:battista@hpsc.ca)

Closing date – February 3, 2010. We regret that only those candidates who are chosen to move to the next level will be contacted personally. We thank those in advance for their interest in Hamilton Health Sciences Foundation.