



**Job Description: Development Officer, Major Gifts & Planned Giving**

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Reporting directly to the Director of Development the Development Officer, Major Gifts & Planned Giving is responsible for ensuring the success in the Foundation's Development Program. The Development Officer, Major Gifts & Planned Giving will be responsible for advancing the mission of Niagara Health Foundation by fostering strong relationships with friends, and donors, and will generate philanthropic support from individuals, corporations and foundations by managing a portfolio of donors and prospects.

**Roles and Responsibilities**

**Specific Responsibilities**

- Manages portfolio of major gift and planned giving prospects through the donor cycle utilizing principles of relationship-management, and personally conducts a pre-determined number of one-on-one visits with prospects on a yearly basis to secure donors and funds.
- Assists in the development and implementation of cultivation, solicitation and stewardship strategies for major and planned giving prospects in adherence with "best call strategy". This involves personally soliciting prospects for major and planned gifts (both outright and deferred), as well as providing the strategy and support for others on the Development team to solicit prospects to maximize the opportunities for fundraising success.
- Works in collaboration with the Development team and Foundation staff to set goals and develop plans.
- Works with the Development team to prepare and update Planned Giving materials including brochures, websites, and forms.
- Moves top prospects through the donor cycle by managing leadership team and selected volunteers. This involves preparation of strategies and briefing notes for calls and completion of call follow-up.
- Works closely with other areas of the Foundation to develop donor relations plans and to maximize major and leadership gift opportunities.

- Develop and execute strategic plans for engaging planned giving donors and prospects through visits, calls, events to achieve the highest level of support from all donors across Niagara, through confirmed estate gifts and current or deferred complex types of gifts;
- Provide a timely, thoughtful and professional response to all planned giving inquiries received by phone, direct mail, emails, and surveys. Develop a follow-up plan, implement relationship management strategies and timetables for both prospects and donors;
- Assists in other duties as required in furthering the goals of the Development team and the Foundation.

### **Community Relationships**

- Ensures that all donors in the portfolio are recognized according to the donor recognition vehicles within Niagara Health Foundation for Niagara Health.

### **Administration, and Technology**

- Ensures timely and accurate maintenance of all gift, solicitation and donor information in Raiser's Edge database including tracking and fulfillment of pledges, donor recognition activities, and receipting and timely acknowledgement.

### **Qualifications & Experience**

- University degree or College diploma in business or equivalent major gift experience
- Minimum 5 years of extensive relationship building experience in a fundraising environment
- Experience in building a planned giving program
- Excellent communication and relationship building skills with an ability to prioritize, negotiate, and work with a variety of internal and external stakeholders
- Excellent writing, research, communications and presentation skills
- Knowledge of Microsoft Office – Word and Excel and Power Point
- Knowledge of Windows, Microsoft Outlook, Internet Explorer
- Strong knowledge of Raiser's Edge or equivalent fundraising database
- Strategic Thinker, Attention to Detail and Strong Program Management Skills
- Personal qualities of integrity, credibility, and dedication to the mission of the Niagara Health Foundation
- Member of CFRE and CAGP considered an asset

Please submit your resume and letter of interest to:

[pamela.shanks@niagarahealth.on.ca](mailto:pamela.shanks@niagarahealth.on.ca)

We regret that only those candidates who are chosen for an interview will be contacted personally. We thank all applicants in advance for their interest in Niagara Health Foundation.