

Development Officer Planned Giving

Job Description

Reporting to the President and CEO, the Development Officer Planned Giving is responsible for ensuring the success of the Niagara Health Foundation's Planned Giving Program. The Development Officer Planned Giving is also responsible for advancing the mission of Niagara Health Foundation by developing and disseminating Planned Giving materials and fostering strong relationships with financial advisors, friends and donors. By managing a portfolio of prospects, the Development Officer Planned Giving will invite donors to include a gift to Niagara Health Foundation in their will, celebrate donors who have confirmed an estate gift and steward bequests.

Roles and Responsibilities

Specific Responsibilities

- Manages portfolio of 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 expectancies;
- Assists in the development and implementation of cultivation, solicitation and stewardship strategies for planned giving prospects. This involves personally soliciting prospects for 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, which may include engaging the 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 planned gift opportunities;
- Develops and executes strategic plans for engaging planned giving donors and prospects through visits, calls and 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;
- Provides a timely, thoughtful and professional response to all planned giving inquiries received by phone, direct mail, emails and surveys. Develops a follow-up plan, implements relationship management strategies and timetables for both prospects and donors; and
- 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 & Technology

- Ensures timely and accurate maintenance of all gifts, solicitation and donor information in Raiser's Edge NXT 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 Development 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;
- General knowledge of Windows and Microsoft Office, and Internet proficiency;
- Strong knowledge of Raiser's Edge, Raiser's Edge NXT, 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; and
- Member of CFRE and/or CAGP considered an asset.

