



DIRECTOR, LEGACY

JOB POSTING

Do you have exceptional relationship building skills? Are you a planned giving professional? Can you take your track record of success and build it into a new program?

Join a thriving foundation known for connecting philanthropy to community needs, enabling maximum community impact through strategic granting and thought leadership.

About Toronto Foundation

Established in 1981, Toronto Foundation (TF) is a registered Canadian charity and one of 191 Community Foundations in Canada.

We pool philanthropic dollars and facilitate charitable donations for maximum community impact in Toronto and across Canada. Our individual, family and organizational funds number more than 600 and we administer \$500 million in assets. Through strategic granting, thought leadership and convening, we engage in city building to strengthen the quality of life in Toronto.

The Role

We are seeking an experienced planned giving professional and team player to lead the evolution of the foundation's legacy giving program.

DUTIES AND RESPONSIBILITIES

The Director, Legacy reports to the President & CEO (the "CEO") and is a member of the senior management team of Toronto Foundation ("TF"). This position is responsible for the development and management of new individual bequests including both general gifts and new funds. The Director will work closely with the Directors of Fundholder Engagement, and Philanthropy, to ensure seamless integration of all activities.

Bequest donor development - 80%

- Pipeline/Referral development
 - Develop and implement a broad based legacy campaign to build a pipeline of new expectancies for unrestricted donations as well as permanent endowment funds.
 - Proactive engagement with current fundholders to encourage and capture their bequest intentions.
 - Lead stewardship activities for current legacy society members.

- Manage the internal process for new estate gift administration and lead stewardship activities with estate trustees and/or family as required.
- Work cross-departmentally with the:
 - Development and Fundholder Engagement teams to ensure a smooth onboarding of new bequest fundholders.
 - Finance team to ensure completion of estate administration activities related to bequest gifts.
 - Communications/Marketing team to develop appropriate tools/materials for reaching the professional advisor network and our individual prospects.
- Seek out relevant opportunities where high net worth individuals can be introduced to TF e.g. presence at public events, speaking engagements, small group private events
- Seek new opportunities for expanding TF presence within our network of professional advisors who target high net worth clients
- Develop impactful presentations that are relevant to professional advisors and deliver in one-on-one and group settings.
- Work individually with board members to identify and cultivate relationships within our target group of high net worth individuals, families and professional advisors.

Strategic and operational planning - 15%

- Maintain a 2-3 year site line for the team
- In partnership with the management team, build an annual plan that builds directly off the TF Strategic Plan
- Work in partnership with the Director Fundholder Engagement, and Director Philanthropy, to set shared key performance indicators, and track outcomes.
- Develop the annual departmental budget
- Achieve annual revenue and expense targets

Managing staff and organizational leadership - 5%

- Hire, train and mentor other members of the legacy team as required.
- Represent the legacy team with the board of directors.
- Work closely with the CEO to keep him/her apprised of sector trends and information relevant to growth strategies that may be unique to a community foundation.
- Participate with peer group of Community Foundations of Canada to share content, and develop new, best practices for Development
- Participate in relevant industry conversations (e.g. social media and webinars) and associations (e.g. CAGP and AFP) to represent TF as a thought leader in the sector

- Conduct team annual goal setting planning and performance review as established by people processes; support employee engagement strategies as required.

REQUIRED QUALIFICATIONS

- Relevant post-secondary education or equivalent experience
- Minimum 10 years related experience in relationship development roles and planned giving including development of successful expectancy models
- Experience within the professional advisor community is ideal

SKILLS AND ATTRIBUTES

- Proven track record of long term relationship building leading to successful new donor acquisition
 - Proven ability to develop and execute plans for new donor development that meet established goals
 - Results-oriented individual with the ability to interpret and effectively manage multiple and competing priorities and timelines
 - Strong management, delegation, planning and leadership skills
 - Effective communication skills both written and verbal
 - Ability to engage clients and deliver excellent service
 - Thorough decision making skills
 - Highly organized, strong attention to detail and ability to multi-task
 - Demonstrated sound work ethics
 - Proven ability to build and maintain strong working relationships
 - Flexible, adaptable and able to work effectively in a variety of settings and with shifting priorities and deadlines
 - Operates with honesty and integrity with a genuine desire to make valuable contributions to the team
 - Team player who fosters team-based learning
 - Works well independently and in a team environment
 - Excellent proficiency in the Microsoft Office Suite
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Submission Details

TF is committed to the fundamental principles of equal employment opportunity. We are committed to treating people fairly, with respect and dignity, and to offering equal employment opportunities based upon an individual's qualifications and performance — free from discrimination or harassment because of race, ancestry, place of origin, ethnic origin, colour, citizenship, creed (including religion), sex (including pregnancy and breastfeeding), sexual orientation, gender identity or gender expression, age, marital or same-sex partnership

status (including single status), family status, disability, and record of offences, in accordance with the Ontario Human Rights Code.

Toronto Foundation is committed to the principles of the Accessibility for Ontarians with Disabilities Act (AODA). As such, we strive to make our recruitment, assessment and selection processes as accessible as possible and provide accommodations as required for applicants with disabilities. If you require any accommodations at any point during the application and hiring process, please contact aclark@torontofoundation.ca

Please submit your resume in confidence by Friday June 28th, 2019 to resumes@torontofoundation.ca, and include the position title and your name in the subject line of the email (eg. Job Title, First Name Last Name).

Due to an expected high volume of applicants, only those selected for an interview will be contacted. Thank you for your time and consideration of Toronto Foundation.

Compensation Range

The salary range for this full-time role is \$105,000 - \$120,000.