**Who we are**

At Heart & Stroke our mission is to promote health, save lives and enhance recovery. We are committed to a culture that exemplifies our core values: champion health, practice humility, embrace change, drive impact, learn and grow and be heartfelt as we work together to beat heart disease and stroke.

We believe in equity, diversity and inclusion ― it’s embedded in our values and core mission work to support all people in Canada to lead healthier lives. We are committed to applying this principle to cultivate a welcoming environment that embraces diversity among our employees. Candidates from diverse backgrounds, including but not limited to, Indigenous peoples, racialized communities, 2SLGBTQIA+ communities, women, and people living with disabilities are encouraged to apply.

To learn more about our mission, values, commitment to EDI, and the difference Heart & Stroke makes in the lives of people in Canada at every age, please [visit our website](http://www.heartandstroke.ca/).

**The opportunity**

The Director, Planned Giving is responsible for developing and leading the implementation of the national Legacy strategy with a portfolio in excess of $25 million annually.

They achieve the goals of the program by managing a team of Legacy Advisors and working collaboratively with regional Development teams, Estate Administration team, marketing/communications, Direct Marketing and data analytics. This role will develop an external network of professionals to support the growth of legacy giving and hold a small, select group of expectants.

The role works collaboratively with the Senior Manager, Estate Administration and the team to ensure and seek opportunities for collaboration on key administration files. Together looking for opportunities to increase engagement and stewardship with NOK/lay executors, professional advisors and administrators.

A collaborative, team-based management style coupled with superior communication skills and a detail-oriented approach are vital to this role. Moreover, the Director, Planned Giving will have the required capability to implement sustainable change initiatives within a national, complex, results-oriented institution with multiple internal and external stakeholders. The incumbent will have the ability to quickly identify and develop mutually co-operative lateral working relationships with colleagues, vendors and suppliers.

***Please note H&S offers hybrid option. Candidates can work from anywhere in Canada.***

**How you will make an impact every day**

Strategic Planning and Implementation

* Lead the development and implementation of a Legacy Giving strategy for the organization that integrates across the overall fundraising strategy
* Lead the development and management of annual and multi-year plans and strategies for the Legacy giving
* Work with Marketing to develop and implement Legacy marketing and communication plans and strategies that align with the overall program plan
* Develop plans to incorporate a wide range of giving options including bequests, gifts of securities and gifts of insurance into our legacy giving plans
* Working from the stewardship framework established by the Central Development team, develop stewardship strategies for the program
* Use relevant analysis and research in the development of Legacy plans and strategies
* Set and monitor annual targets and benchmarks for Legacy expectants for all Legacy Advisors
* Work with Legacy Advisors to develop a pipeline of prospects and expectants for each advisor

Legacy processes and administration

* Collaborate with Senior Manager, Estate Administration to solicit their feedback and input in any process decisions regarding files to ensure they are administered accurately and expediently to realize funds efficiently
* Look for opportunities to build relationships with external stakeholders, including allied professionals, executors, trustees and charitable co-beneficiaries
* Advise Development Teams and Legacy Advisors on complex estate gifts and complicated gifts of securities, life insurance, annuities, trusts and residual interest and property
* Lead the development, implementation and maintenance of standard policies and procedures for the acquisition, acceptance and administration of Legacy gifts
* With Finance, develop and manage the of financial outlooks and budgets for the Legacy program.

Legacy Giving Program Management

* Implement execution of all Legacy marketing and communication strategies including development of critical path and budgets and appropriate involvement of stakeholders from early stages through to final approval.
* Work collaboratively with Regional Development Leads and teams to provide gift planning opportunities to donor prospects
* Work cross-functionally with Direct Marketing and Marketing/Communications teams to develop and plan the execution of all Legacy marketing and communication initiatives
* Manage information about the Legacy pipeline and bequest administration to enable useful management reporting and meaningful metrics that will inform the strategic direction of legacy.
* Work with data analytics team to gain insights on legacy prospect and expectant pipeline

Talent Management

* Lead talent development, ensuring high standards, competence and that staff is well supported in fulfilling their accountabilities, developing their skills and achieving their career potential.
* Providing clear direction on business goals and priorities; ensure optimal deployment of resources to achieve business goals.
* Establish performance plan and objectives and review on an ongoing basis; provide coaching and feedback as per the performance management process
* As required, recruit skilled talent in support of current and future Foundation needs, following Foundation policies, interviewing methodology and assessment guidelines.
* Familiarize and comply with all HSF policies while ensuring accurate administration of employee related information: absence records, vacation, title, etc.

**Who we need**

**Education**:

* CFRE and/or CAGP designation
* Post-secondary or equivalent combination of education and experience

**Experience:**

* 10 years of gift planning experience and developing strategic plans
* 3-5 years of people management experience

**Skills:**

* Demonstrated strategic thinking and planning
* Ability to develop long-term, trust-based relationships with potential donors that support the donor’s vision for philanthropic giving, the desire for a legacy and the donor’s personal needs;
* Ability to translate sometimes complex technical, legal and tax-related language and concepts, where necessary, into plain English to aid in the donor’s and internal partners comprehension
* Strong collaborator, with superior interpersonal and relationship-building skills
* Self-motivated, with superior ability to produce high-quality work under tight deadlines, combined with a comfort managing multiple projects, priorities and deadlines
* Sound judgment and ethical decision-making skills
* An ability to manage for results and set and establish new standards of success
* Excellent attention to detail and analytical skills, including database segmentation and ROI analysis
* Ability to work in a multi-layered, results-oriented organization with multiple stakeholders
* Proficiency in Microsoft Office applications and fundraising databases
* Bilingual (French/English) an asset

**What we offer**

At Heart & Stroke, we make it a priority to foster a culture of caring by implementing practices and programs that foster respect, compassion, trust and attentiveness to our own and others’ health and well-being.

In addition to a competitive salary, we believe that time off is integral to the personal health and wellness of our employees. We offer a generous paid time-off package including vacation days, personal days, wellness days, and paid company-wide closure between December 25 and January 1. We also provide competitive health, medical, dental and vision benefits, life insurance, disability benefits, an employee assistance program (EAP) and a defined contribution pension plan with employer matching. Our employees also enjoy a flexible hybrid working model and reimbursement for mobile phones and home office setup, as well as opportunities for professional development.

**Apply now**

If you want to join the fight to beat heart disease and stroke, please apply through our website: <https://heartandstroke.applytojob.com/apply/Y1Lvg7kuYg/Director-Planned-Giving> **.** Applicants must be currently residing in Canada and legally entitled to work in Canada.

Only those candidates that qualify will be selected for an interview. At this time, all interviews are being conducted via phone and/or video call ― we look forward to “virtually” meeting you!

**Accommodation**

We are committed to fostering an inclusive, barrier-free and accessible environment. If you have been contacted for an interview and require accommodation to participate in the recruitment and selection process, please let us know and we will do our best to address your needs.