

POSITION PROFILE

Director Planned Giving



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Position Overview

Organization:	Heart & Stroke https://www.heartandstroke.ca/
Title:	Director, Planned Giving
Reports to:	Executive Vice President, Fundraising & Marketing
Direct Reports:	3 Senior Advisors (Ontario, B.C., Quebec)
Location:	Anywhere

Is this you?

Heart & Stroke's is currently raising approximately \$25M annually in Planned Giving across the country. This is a rare opportunity to support the overall long-term financial strength of one of the most important and largest charities in the country.

Our ideal candidate can work from anywhere in Canada and will bring broad experience in planned giving fundraising as well as successful strategies to grow the planned giving program. The Director Planned Giving will have exceptional interpersonal skills. Leading a team of three advisors across the country our successful candidate will work cross functionally across the organization e.g., legal, finance, marketing and the entire fundraising teams to amplify the potential. An understanding of current laws regarding taxability of donations by region, familiarity with deferred giving strategies and knowledge of a diverse array of financial instruments is essential. The ability to develop knowledge of, respect for, and skills to engage with a myriad of stakeholders is required.

Responsibility and accountability to design, implement, manage and evaluate the future strategy for planned giving, including stewardship, to support future priorities through realized and deferred gifts will be the focus of this role.

Executive Summary

Heart & Stroke's mission is to promote health, save lives, and enhance recovery as it relates to heart disease and stroke. They are committed to a culture that exemplifies their core values: CHAMPION Health, PRACTISE Humility, EMBRACE Change, DRIVE impact, LEARN and GROW, and BE HEARTFELT.

Heart & Stroke is a leading funder of life-saving research, which has led to breakthroughs such as heart transplant surgery and a revolutionary stroke treatment that cuts the death rate by 50%.

They empower Canadians to live healthier lives — from preventing and controlling high blood pressure to getting more physical activity. And they fight for change that will create better health for all, such as reducing salt in the food supply and improving access to stroke rehabilitation.

But there's a lot more to do. Much more.

The threat is urgent.

Heart disease, stroke, and related conditions take **one life every five minutes** in Canada. An estimated 1.6 million more Canadians are living with the devastating effects of these diseases. An astounding 9 in 10 Canadians have at least one risk factor, such as high blood pressure, obesity, tobacco use, lack of physical activity, and diabetes.

The threat of heart disease and stroke has never been more urgent. And it's amplified by our aging population, sedentary lifestyles, poor diets, and more.

Life. We don't want you to miss it. TM

For more than 60 years, Heart & Stroke have been dedicated to fighting heart disease and stroke. Their work has saved thousands of lives and improved the lives of millions of others. They have invested more than \$1.52 billion in heart and stroke research, making them the largest contributor in Canada after the federal government. In that time, the death rate from heart disease and stroke has declined by more than 75 per cent. The health promotion and advocacy programs across the country are saving lives every day. Working together, employees,



volunteers, donors, and world-class researchers have made Heart & Stroke Canada's most widely recognized and trusted authority on cardiovascular health.

Big challenge, ambitious goals

To tackle these challenges, Heart & Stroke focuses efforts on areas where they can make the biggest impact. They are working to beat heart disease and stroke with innovative programs such as:

Heart-Brain Connection: Seeking to gain better understanding of the critical connections between the heart and the brain, in January 2021, Heart & Stroke & Brain Canada announced a partnership resulting in a research award in the amount of \$6M – the *Heart-Brain Connection IMPACT Award*. This research will investigate and unravel the heart-brain connection to improve knowledge and treatments.

Closing the Gap on Health Inequities: Prioritize closing the gap in Women and Indigenous health. All research applications must integrate Sex- and Gender-Based Analysis and Reporting (SGBAR) to be considered for funding and to create and sustain meaningful change. They are working on a framework to apply the principles of Equality, Diversity, and Inclusion (EDI) to be integrated across all research programs, in the way that it is for *IMPACT Award*.

Heart & Stroke currently funds two research Chairs in Women's Indigenous Heart and Brain Health in partnership with the Canadian Institutes for Health Research (CIHR). In late 2021, H&S is also hosting the third annual Canadian Women's Heart Health Summit in partnership with the Canadian Women's Heart Health Centre at the University of Ottawa Heart Institute.

Heart Failure: Working to lessen the burden of heart failure, which afflicts over 600 thousand people in Canada, in collaboration with World Heart Federation and other Canadian health partners. The first order of business is to collect data to better understand current resources and services throughout all health care institutions in the country.

Advocating for Healthy Policies: Pushing for a national pharmacare program to provide the access to medically necessary medication that everyone in Canada deserves and reduce the burden on the health care system. Working to restrict youth vaping and cap nicotine levels in vapes, as well as restrict the marketing of unhealthy products such as sugary drinks to children.



Increasing Cardiac Arrest Survival Rates: Looking at new ways to increase the survival of out-of-hospital cardiac arrest. They support a vast network of Cardio-Pulmonary Resuscitation training across Canada and have been instrumental in placing Automated External Defibrillators in public places. Looking for innovative ways and partnerships to drive the survival rate up.



The Opportunity

Our ideal candidate will bring a breadth & depth of experience in planned giving fundraising, Nationally. The **Director Planned Giving** will inherit a very successful Planned Giving portfolio and will play a key leadership role in designing, implementing, and managing the future strategy for the growth of Planned Giving at Heart & Stroke that integrates across the overall fundraising strategy for the organization. Working collaboratively with a national, complex, results oriented organization our successful candidate will have the ability to quickly identify and develop mutually co-operative lateral working relationships.

Primary Accountabilities

This role will be accountable for an annual Planned Giving fundraising target of a minimum of \$25M. Our successful candidate will:

- Design, implement and manage a comprehensive strategy and team to identify planned giving prospects, secure planned giving commitments and steward identified planned giving donors with the goal of increasing the number of legacy and major planned gifts and providing ongoing, meaningful stewardship to existing donors over their lifetimes.
- Develop an annual plan that includes accurate budget forecast for expenses and goal for confirmed expectancies. Participate and collaborate with other members of the fundraising team Nationally to develop a strategic, comprehensive approach to generating planned giving support and leveraging donors
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- Work collaboratively with Internal (regional development teams, estate administration, marketing/communications, central development, direct marketing, and data analytics) and External (professional advisors, administrators, lay executors, Next of Kin etc...) stakeholders to increase opportunities. Specifically, enhance planned giving awareness among Heart & Stroke donors working collaboratively with marketing and communications to develop communications materials and marketing strategies.

- Identify, cultivate and solicit planned gifts, both annual and endowed, through a rated prospect list.
- Steward and personally manage a portfolio of current planned giving donors and deepen connections with Heart & Stroke through regular personal contact, communications, and special events.
- Maintain a current and in-depth knowledge of planned giving vehicles, including bequests, life insurance, charitable remainder trusts, pension funds, gifts of securities, and their applicability to individual donor situations across Canada.
- Ensure the necessary systems, policies and procedures are in place to operate the planned giving program within the regulatory framework of the Canada Revenue Agency.
- Execute and manage the administrative duties of the position and, ensure the team is accurately tracking enquiries, monitoring relationships, and recording commitments and realized planned gifts.
- Conduct in-person meetings as required with planned giving prospects (cultivation/solicitation) and planned giving donors (stewardship).

The Ideal Candidate

The successful candidate will possess a passion for health philanthropy, highly strategic and be a consummate professional and role model, with excellent communication skills, professionalism, and interpersonal skills that foster meaningful relationships with donors and prospects.

The ideal candidate will possess/be able to:

- Minimum of eight years' experience in a senior leadership role in Planned Giving
- Experience leading a high-performance team and working in a results-oriented organization with multiple internal and external stakeholders and enjoys working well with diverse groups of people and building strong relationships
- Strong attention to detail and ability to manage complexity particularly with legal and financial processes, including tax treatments of various charitable gift arrangements
- Consistently demonstrates the highest standards of professionalism, confidentiality, integrity, and sensitivity
- Experience working with lawyers/accountants and financial planners in a corporate environment is an asset
- Able to seek out opportunities and anticipate challenges, and identify strategies for successful implementation

Application Instructions

Please **send your application to cathy@phcap.ca** including your cover letter and CV by no later than Wednesday, November 30th, 2022.

In addition to a competitive salary, Heart & Stroke believe that time off is integral to the personal health and wellness of employees. They 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. They also provide competitive health, medical, dental and vision benefits, basic life and disability insurance, an employee assistance program (EAP) and a defined contribution pension plan with employer matching. Heart & Stroke employees also enjoy a flexible hybrid working model and reimbursement for mobile phones and home office setup, as well as opportunities for professional development.

Heart & Stroke is committed to fostering an inclusive, barrier-free, and accessible environment. If you are contacted for an interview and require accommodation to participate in the recruitment and selection process, please advise and we will work with you to meet your needs.

At Heart & 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 and LGBTQ2+ communities, women, and people with disabilities, are encouraged to apply.

We thank you for your interest in this opportunity. Please note that only qualified respondents will be contacted.