

THE OPPORTUNITY

We are seeking an Associate Director, Legacy and Planned Giving to lead the strategy and execution of our Planned Giving program. Building on recent program success, the role will proactively communicate and build relationships with prospects and donors leveraging the strong annual and monthly donor base to grow this important revenue stream. The ideal candidate will be a valued subject expert who will bring their knowledge and experience in planned giving programs and vehicles along with excellent relationship building skills to create meaningful connections with donors, prospects, professional advisors, and colleagues to increase current and future giving.

ABOUT US

North York General Foundation's mission is to raise and steward funds that enable North York General Hospital (NYGH) to deliver exceptional health care to our growing and diverse community. Exceptional care requires exceptional support. At North York General Foundation, we know this to be true, which is why we are grateful to every one of our supporters who understand the central role that NYGH plays in caring for our community. The Foundation supports the hospital's most urgent needs, including upgraded equipment, technology and new care environments. We look beyond the needs of the day to day and seek to invest in programs and infrastructure that will transform how our hospital delivers care and how this improved care can be replicated and scaled across Canada.

North York General Hospital is proud to be:

Top community academic hospital in Canada, one of the top 5 hospitals in Canada, and one of the top 100 in the world (Newsweek)

- Top performer in Ontario in wait times
- Pioneer in people-center care
- At the forefront of digital health and named among the world's best smart hospitals
- Top choice for medical education
- Trailblazers in quality of care and patient safety

North York General Hospital is a leading community academic hospital serving a population of nearly 500,000 in one of Toronto's most diverse and rapidly growing areas. The hospital provides a wide range of acute care, ambulatory, and long-term care services across seven sites. In addition to having one of the busiest Emergency Departments in the GTA and one of the highest volume single-site birthing centres in Canada, the hospital is well recognized for clinical excellence including breast cancer and colorectal cancer care, family medicine, children's mental health, palliative care, and geriatrics. NYGH also owns and operates a 192-bed long-term care (LTC) home, the Seniors' Health Centre (SHC), which is known for leading-

practice, seniors-focused care. Beyond health care delivery, NYGH is at the forefront of applied research in Canada and is a top destination for learners.

NYGH is known for:

- Labor & Delivery: One of the busiest single-site birthing centers in Ontario
- Family Medicine: Among the largest family medicine departments in Canada
- Emergency Department: One of the busiest in Ontario with the shortest wait times
- Cancer: Canada's only accredited breast cancer program
- Seniors' Care: Building one of the largest long-term care centers in Ontario
- Mental Health: Leader in mental health for youth, adults and seniors across four sites

For more information about North York General Hospital and its Foundation, please visit nyghfoundation.ca

ROLES & RESPONSIBILITIES

Planned Giving:

- Develop and implement the annual Planned Giving program business plan, in collaboration with the Chief Development Officer and with the support of a Philanthropy Associate.
- Manage a portfolio of 80-100 planned giving prospects and donors in a manner that ensures consistent growth and maintains a high standard of relationship management.
- Strengthen the pipeline through personal outreach (by phone, donor visits, email), community engagement, and education sessions to cultivate, solicit, and steward donors and increase revenue according to pre-defined targets.
- Work collaboratively with the Marketing and Communications team to lead and coordinate planned giving mailings and communications through digital and traditional means.
- Act as an internal resource on gift and estate planning for other Foundation staff and volunteers and work cross functionally to identify and develop new Planned Giving prospects.
- Lead the estate portfolio including tracking, scheduling, and reporting on the status of estates under administration.
- Manage relationships with financial planning professionals including estate trustees, lawyers, and family members to ensure the smooth and timely execution of estate plans.
- Consult with advisors with respect to Gift & Estate Planning issues on behalf of the Foundation.
- Responsible for the management of estate administration, including engaging and liaising with professional advisors for counsel to help resolve complicated or contested estate files as necessary.

- Support and execute annual campaigns to uncover existing planned gifts and source new leads.
- Initiate and manage planned giving partnerships (Will Power, DMP, Epilogue), as per business plan and budgets.
- Support the strategy related to the stewardship and continued cultivation of existing planned giving donors in conjunction with the Donor Experience team.
- Ensure data integrity of Raisers Edge by entering actions accurately and in a timely manner to support the measurement of key performance indicators.
- Keep abreast of new planned giving trends, applicable CRA tax laws, as well as adherence to ethics and accountability both in securing planned gifts and administering estates.

Relationship & Alliance Building:

- Proactively engage with experts in the insurance and investment sectors to identify new opportunities for NYGF and to bring planned giving options forward to prospects.
- Build, develop, and maintain effective and mutually beneficial partnerships with key stakeholders within NYGH and the Foundation, building awareness and gaining support to further the goals and objectives of the Planned Giving and Foundation programs and the organization as a whole.
- Attend and participate at various Foundation recognition and fundraising events to support planned and other Foundation giving.

QUALIFICATIONS & COMPETENCIES

- Progressive non-profit experience, with a proven track record soliciting and closing planned gifts, ideally within a hospital, education, or other complex setting.
- Strong relationship building skills with experience working with diverse groups including donors, senior volunteers, financial planning professionals and Foundation and Hospital staff.
- Thorough understanding of major and planned giving fundraising with direct experience interacting and cultivating major and planned giving donors, volunteers, and industry representatives.
- Knowledgeable on planned giving trends, tax implications of planned gifts and legislation.
- Demonstrated experience administering estates from notification to completion, and working closely with donors, executors, and professional advisors to realize planned gifts.
- Excellent communications skills including superior verbal, written and presentation skills.
- Demonstrated ability to manage and interact in the utmost professional manner.

- Strong customer service-oriented approach that demonstrates the highest standards of professionalism, confidentiality, and sensitivity complemented by excellent organizational and time management abilities.
- High level user with a well-developed understanding of database systems and analytics, ideally Raiser's Edge.
- Passion for healthcare philanthropy, North York General Hospital, and its leadership role in the Greater Toronto Area. This position will be a self-starter who thrives equally well in a work from home setting and a traditional office environment.

NYGHF is working within a hybrid model. We offer a competitive, comprehensive compensation/benefits package with a salary range of \$98,500-\$120,000.

Please forward your resume and cover letter to FoundationCareers@nygh.on.ca by May 16, 2025. Please reference Associate Director, Legacy and Planned Giving in the subject line and you will be contacted if we feel there is a great fit.