

## **Job Description – Director of Planned Giving**

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### **Title**

Director of Planned Giving

### **Reports To**

Chief Development Officer (CDO) - KGH Foundation

### **Summary**

As a member of the fundraising development team, the Director of Planned Giving is responsible for developing, cultivating and managing the Planned Giving program. This role is integral in driving net revenue growth in all aspects of fundraising for the KGH Foundation: Planned Giving, Major Gifts and the Endowment portfolio. The Director of Planned Giving will grow the program by building and maintaining strong relationships with identified prospects and donors while leveraging the database to identify new potential partners. This position will also be a critical link between the Foundation and its allied industry partners within the community. The Director of Planned Giving will broaden the range of planned giving instruments that KGHF offers to prospects and donors to maximize their gifts. This role works closely with the entire Foundation team to develop the Foundation's emerging partner pipeline including cultivation, stewardship and solicitation practices.

### **Core Competencies**

- Relationship building
- Excellent public speaking skills
- Professional Communications
- Team Work and collaboration
- High calibre quality
- Time Management
- Adaptability/ Flexibility
- Creative and Innovative thinking
- High level critical thinking skills
- High calibre writing skills
- Planning and Organizing
- Problem Solving
- Result Focus
- Accountability and Dependability
- Ethics and Integrity
- Development and Continual Learning ethic

### **Job Duties**

- Maintain successful planned giving program
- Work with the Foundation team to develop and meet expectations for ongoing program strategy, timeline, objectives and metrics;
- Develop/Manage program budget
- Maintain a portfolio of legacy and major gift donors.
- Identify, cultivate and solicit donors to secure commitments of planned gifts

- Utilize advice and information provided by allied professionals on gifting instruments including bequests, annuities, trusts, life insurance, stocks/shares, etc
- Steward planned gift donors through in-person contacts, telephone, email and written correspondence
- Work with the Foundation team to oversee planned giving marketing strategies including but not limited to direct response programs, newsletters, website, advertising materials and other educational sessions for donors and professional advisors
- Principal liaison to the professional advisors network and community
- Oversee the Memorial/Tribute Gift Program
- Promote and support active and broad participation by staff and volunteers in raising planned gifts
- Attend and assist with donor cultivation and stewardship events. Provide timely follow-up as required
- Full document professional activities and donor contacts, effectively use “moves management” techniques.
- Maintain an in-depth knowledge of the Foundations’ programs and priorities, its’ administrative and financial processes, inspire respect and confidence in donors and prospects
- Follow CRA regulations regarding fundraising and external communications
- Staff resource to the Planned Giving Committee
- Maintain Professional Advisors network activities
- Other duties as required

### **Requirements**

- Post-secondary education in a relevant field
- Proven track record of growth as a leader of a non-profit Planned Giving program
- 5+ years of experience in fund development with a strong focus on Planned Giving (minimum 5 years) and/or a strong technical understanding of the Canadian Planned Gift environment including giving instruments, legislative and tax guidelines and emerging issues and opportunities
- Familiarity with RE/NXT database
- Strong business analysis and planning skills
- Proven high-end donor relationship management skills
- Excellent written and spoken communications
- Exceptional organizational skills an required to balance multiple priorities
- Ability to inspire, collaborate and motivate others
- CAGP membership and/or CFRE designation considered assets

### **Working Conditions**

- Some minor travel required by vehicle with mileage allowance provided.
- Ability to attend and conduct presentations.
- Manual dexterity required to use desktop computer and peripherals.
- Overtime as required.