



**JOIN OUR TEAM. CHANGE YOUR CAREER. CHANGE THE WORLD.**

## **SENIOR MANAGER, PLANNED GIVING**

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**Organization:** Plan International Canada  
**Reports to:** Director, Philanthropy  
**Location:** Toronto

### **About You**

Are you passionate about equal rights for all children and equality for girls? Can you see yourself being an integral member of a team that works towards transforming lives in developing countries? Are you confident that you can be part of a high performing team focused on expanding our well established Planned Giving program?

Are you passionate about helping donors realize their charitable vision through donations linked to their financial or estate plans that have tax implications/benefits? Within the organization this program is responsible for gifts through a will, trusts, insurance, gift annuities, retirement savings plans and donations of securities as – as well as select complex current gifts.? Are you an experienced leader? Have you had success with growing a Planned Giving program? Are you a trusted Planned Gift Leader with a collaborative working style and an ability to engage with diverse internal stakeholders adding value to organizational excellence and encouraging creative problem solving?

### **Why a career with Plan?**

A career with Plan International Canada offers individuals a meaningful experience that drives professional development and a rewarding opportunity to use their skills and talents to help make a difference in promoting child rights to end child poverty. Are you ready for an opportunity to join one of the largest International NGOs in the world, creator of the award winning “Because I am a Girl” global movement, working to end gender inequality and promote girls’ rights? Are you excited about playing an important role in determining the future of millions of children and families globally?

Employees at Plan International Canada’s National Office strive to make a difference in the lives of children and their families through sustainable, child-focused community development.

Joining our dynamic team of experts and specialists can change your life too!

Our unique culture fosters a supportive, flexible workplace where employees are encouraged to bring their whole selves to work. As a member of a diverse, dynamic, high-performing team,

each Plan employee is driven to learn, valued for their contribution and approaches each day excited to make an impact.

We are proud of our award winning corporate culture validated by our *Canadian Nonprofit Employer of Choice* award for 2015 and 2016 and *Canada's 10 Most Admired Corporate Cultures* since 2012.

Join our high performing team and change your career...change the world!

### **The Organization**

Founded in 1937, Plan International is one of the world's oldest and largest international development agencies, working in partnership with millions of people around the world to end global poverty. Not for profit, independent and inclusive of all faiths and cultures, Plan International strives for a just world that advances children's rights and equality for girls.

**Because I am a Girl** is Plan International's global movement to transform power relations so that girls everywhere can learn, lead, decide and thrive.

Plan Canada's Toronto and Ottawa-based offices undertake fundraising, donor engagement and public outreach initiatives that support programs that are implemented in more than 50 developing countries across Africa, Asia and the Americas. Plan has a dedicated staff of over 200 employees whose role is to support quality programming in the areas of health, education, water and sanitation, economic security, gender equity, child protection and participation, and humanitarian assistance.

Further information can be found at: [plancanada.ca](http://plancanada.ca).

### **The Position**

As an active, collaborative, key leader on the Philanthropy team, the Senior Manager of Planned Giving plays an integral role in ensuring the success of Plan Canada's fundraising activities in a high-growth \$100 million campaign. The Philanthropy team is responsible for fundraising for Plan International's core programming activities, with the Planned Giving program is focused on securing both a broad base of support, and major giving. We are observing strong interest among Planned Gift supporters across Canada in our cause, especially Toronto, Vancouver, Victoria, the Prairies, Montreal, and Calgary.

We are seeking a candidate who can bring a high growth vision to continue the success of our Planned Gifts program in the context of the new campaign. We are investing resources in the growth of our Planned Giving program. This opportunity allows for a Planned Gift Leader to support complex current and future gifts. We utilize a multi-prong approach to Planned Giving by the Senior Manager, who will solicit and visit a select personal portfolio of philanthropists, and lead four direct reports with a range of income channels: via face-to-face visits, bequest marketing, estate administration, a board emeritus program, community foundations, and stewardship of confirmed future planned gifts. There is a collaborative relationship with colleagues on the major gifts and mid-level gifts teams.

### **What does success look like?**

- Lead solicitations for a portfolio of planned giving donors making current and deferred gifts through a variety of solicitation methods including face-to-face meetings

- Collaborate on growth strategy with the Director of Philanthropy to increase planned gift current and future revenue
- Lead team to oversee integration of legacy messaging in all communications to market and solicit planned gift donors
- Support team to oversee seamless processes around gifts of securities
- Expand a stewardship program. Develop and produce a first-rate legacy newsletter with compelling content

**As our ideal candidate you will have:**

- Provide strategic input, technical expertise, and guidance to confirm future and current gifts while managing the administration of more than 120 estates annually.
- 7-10 years' experience in a responsible fundraising role within a complex organization; or equivalent role in fields such as law, accounting, trust administration, life insurance or financial planning
- Familiarity with planned giving instruments and in-depth understanding of techniques and strategies
- Knowledge and understanding of tax laws, regulations and compliance issues that govern charitable giving
- Interest in high growth campaign fundraising
- Lead solicitations for a portfolio of planned giving donors making current and deferred gifts through a variety of solicitation methods including face-to-face meetings
- Business acumen and the ability to influence others by fostering strong business relationships
- A flexible and adaptable work style; open to collaboration with strong personalities and professionals; thrive in a fast-paced evolving work culture
- A passion for mission driven work and personal values aligned with those of Plan International Canada's corporate values

**How to apply:**

To express interest in this exciting opportunity to join a dynamic organization and a high performing team please forward your CV and covering letter, outlining your skills, experience and salary expectations to [gethired@plancanada.ca](mailto:gethired@plancanada.ca) by February 2, 2018. Please reference **Senior Manager, Planned Giving** in the subject line.

Plan International Canada is an inclusive workplace, and is committed to championing accessibility, diversity and equal opportunity. Requests for accommodation can be made at any stage of the recruitment process providing the applicant has met the bona-fide requirements for the open position. Applicants need to make their requirements known when contacted.

Consistent with our Child Protection Policy the successful candidate must receive clearance by a police background check, including the vulnerable sector screen.

Applicants must be eligible to work in Canada for the duration of the work term. Proof of eligibility will be required.

Plan International Canada sincerely thanks all applicants for their expressed interest in this opportunity however only those selected for an interview will be contacted. No phone calls please.

**Thank you for your interest in a career at Plan**