



Legacy Giving Associate

Do you want to be part of a dynamic team that is making significant impact on the advancement of healthcare on Vancouver Island? If so, the Victoria Hospitals Foundation may be your next opportunity!

The Victoria Hospitals Foundation works in partnership with Island Health to enable donations to every area of care at Royal Jubilee, Victoria General, and Gorge Road hospitals. As Island Health's largest charitable partner, we raise donations for medical equipment, special projects, education, and research. Our donors fund an incredible 40% of the equipment in Victoria General and Royal Jubilee hospitals.

In 2020/21, the Foundation earned revenue of over \$15 million, including gifts from over 5,200 donors. Since 1989, the Victoria Hospitals Foundation has raised more than \$163 million to benefit our hospitals.

The **Legacy Giving Associate** will be responsible for cultivating, soliciting, and stewarding a portfolio of planned giving donors. This role will oversee the planned giving program and estate giving administration and report to the Manager, Leadership and Legacy.

The Legacy Giving Associate will develop customized engagement, cultivation, stewardship, and solicitation strategies for planned giving donors. Key objectives for this role are to grow bequest intentions, deepen relationships with planned giving donors and prospects, develop and implement the annual planned giving marketing strategy, and administer estate gifts with executors and surviving family members. This role is also essential in ensuring all Foundation estate donors receive the appropriate recognition as identified in our Gift Acceptance and Recognition Policies as well as stewarding planned giving donors and will serve as a representative of the Victoria Hospitals Foundation.

Key Responsibilities:

- Working collaboratively with the Foundation team, ensure the Foundation's planned giving donors are cultivated, solicited, recognized and stewarded in a timely, personalized, and meaningful way that is consistent with our donor policies.
- Identify, cultivate, and solicit planned giving prospects and donors to the Foundation.
- Support strategic giving and planned giving options, including gifts of securities, trusts, wills, annuities and insurance.
- Administer active estates to the Foundation, including communication with executors, in collaboration with the Finance team.
- Project manage and host planned giving donor cultivation and stewardship events that demonstrate the impact that philanthropy makes in our hospitals.
- Build relationships with all donors and prospects in person, over the phone and email and via written correspondence.
- Using donor-centric language, write impact reports and stewardship letters for estate donors.



- Cultivate relationships with allied or estate planning professionals, maintain professional advisor list and promote the opportunity of giving through the American Friends of Victoria Hospitals Foundation.
- Lead the engagement of planned giving prospect and cultivate a pipeline of individual planned giving donors.
- Lead the implementation of an annual planned giving marketing strategy in collaboration with the Marketing and Communications team, including print advertising, social media content, direct response and online marketing. Ensure marketing strategy is aligned with the national CAGP Will Power program, of which the Victoria Hospitals Foundation is a founding partner.
- Evaluate the fundraising potential for planned gifts within donor segments in consultation with the Philanthropy, Legacy & Leadership, Marketing and Communications and Research teams.

Qualifications:

- Baccalaureate degree in a relevant field and three to five years of professional experience in a fundraising or financial services sectors is required.
- Working knowledge of strategic giving, stewardship, and philanthropic trends is key.
- Knowledge of CRA regulations as they relate to charitable giving is required.
- Previous responsibility for, and demonstrated success in, identifying, cultivating, soliciting and stewarding planned gifts. Or, previous experience in client relations that includes strategic philanthropy planning and implementation.
- Knowledge of hospital or healthcare philanthropy is an asset.
- CFRE designation or professional designation in financial planning.
- Must have demonstrated knowledge of various methods of giving and be able to communicate the advantages of each to donors.
- Proficient with the Microsoft suite of programs. Specific knowledge of Raiser's Edge is required or a comparable relational database.
- A valid driver's license is required and access to a personal vehicle is an asset.
- Superior oral and written communication skills for a wide variety of audiences.

About Us:

Our team is a highly collaborative with a strong connected purpose. We are passionate about supporting the health and well-being of our community through philanthropy and deeply care about the health of our hospitals. Our team is innovative and approaches feedback as an opportunity to learn and grow, seeking understanding of different perspectives. We lead by example and hold ourselves to a high standard of professionalism. Above all, we share the same values and support one another in the profound work we do.

Join Us:

We welcome qualified candidates to submit a detailed cover letter and resume in confidence to VHFHR@viha.ca. Full job description available upon request. This position is open until filled. Please include "#21-10 – Legacy Giving Associate" in the subject line.



To note: Based on the Provincial Health Order, any offer of employment will be contingent on the provision of proof of a double COVID-19 vaccine.