



VICTORIA HOSPITALS
FOUNDATION

Giving makes us all better

Planned 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, Victoria Hospitals Foundation may be your next opportunity!

The Victoria Hospitals Foundation (VHF) 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 charitable partner, we raise donations for medical equipment, special projects, education, and research. VHF donors fund an incredible 40% of the equipment in Victoria General and Royal Jubilee hospitals.

In 2020/21, we received raised over \$14 million for our hospitals, including gifts from over 5,200 donors. Since 1989, the Victoria Hospitals Foundation has raised more than \$163 million to benefit our hospitals. Our community generously funded thousands of pieces of urgently needed medical equipment and special projects to help these hospitals provide care to all 850,000+ residents of Vancouver Island.

The **Planned Giving Associate** will be responsible for growing planned gifts to the Victoria Hospitals Foundation and working with a portfolio of planned giving donors. This role will implement strategies to grow an existing strong program and estate giving administration. This senior strategic role will report to the Manager, Leadership and Legacy Giving.

The Planned 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. This role is also essential in ensuring all Foundation estate and planned giving donors receive the appropriate recognition as identified in our Gift Acceptance and Recognition Policies 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 with fundraisers on the team.
- Administer active estates to the foundation, including communication with executors and surviving family members, in collaboration with the Finance and Administration team.
- Organize and execute planned giving donor cultivation and stewardship events and hospital tours 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.
- Cultivate relationships with allied and estate planning professionals, maintain professional advisor list and promote the opportunity of giving through the American Friends of Victoria Hospitals Foundation.
- Lead the implementation of an annual planned giving marketing strategy in collaboration with the Foundations' talented Marketing and Communications team, including print advertising, social media



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content, direct response and online marketing. Ensure marketing strategy is aligned with the national CAGP Will Power program that the Victoria Hospitals Foundation is a founding partner of.

- Evaluate the fundraising potential for planned gifts within donor segments in consultation with the Philanthropy, Legacy & Leadership Giving, 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, planned giving, 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 is an asset.
- 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 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 are dedicated to continuous learning and professional development to continue to be at the leading edge of fundraising for our community. 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 to VHFHR@viha.ca. The posting will remain open until filled. Full job description available upon request.

Please include "Planned 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.