



ASSOCIATE DIRECTOR, GIFT & ESTATE PLANNING

VGH & UBC Hospital Foundation raises funds for specialized adult health services and research for all British Columbians, including the largest, most specialized hospital in BC. Donors contribute over \$40 million to the Foundation every year to drive innovation and sustainable health care at VGH & UBC Hospital, GF Strong Rehab Centre, Vancouver Coastal Health Research Institute, and Vancouver Community Health Services.

As we build our philanthropic capacity and execute our new strategic plan, we have identified the need to add a leading fundraiser to our Gift & Estate Planning team. The Associate Director role has been created to work in partnership with the Director, GEP, to develop and implement strategies and workplans to grow revenue and increase expectancies, and help elevate our already comprehensive legacy giving program. This is an exciting opportunity for an exceptional fundraising professional to:

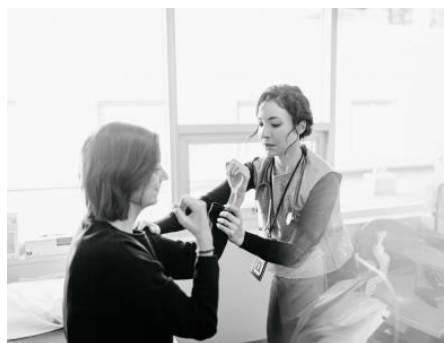
- Play a lead role in shaping the future of our GEP program;
- Work with an established and credible team of fundraising leaders;
- Develop important donor relationships;
- Manage multifaceted complex estate and planned gifts;
- Lead other GEP team members, as well as grow the team;
- Build meaningful and productive relationships with Foundation colleagues, professional advisors in the community, and others in the gift planning community.

While this role is a gift planning specialist, we encourage applicants who have not yet developed full expertise in estate planning, and are keen to dedicate themselves to it. Therefore a background in major donor cultivation and relationship building is essential, and planned giving experience would be ideal.

VGH & UBC HOSPITAL FOUNDATION

VGH & UBC Hospital Foundation is Vancouver Coastal Health's primary philanthropic partner, raising funds for specialized adult health services and research for all British Columbians. VGH is one of two accredited Level 1 Trauma Centres in BC and, together with UBC Hospital and GF Strong, are the province's main referral centres. For instance, VGH is the largest, most specialized hospital in BC and the number-one adult health care referral centre. Nearly half the patients come from outside Metro Vancouver for advanced treatments that are only available here. As well, GF Strong is the largest and most specialized rehabilitation centre for people in BC and the Yukon who have suffered spinal cord or brain injuries.

The simple truth is, if you are seriously ill or injured, our hospitals are your best chance. There are few illnesses or injuries our medical teams cannot treat, no matter how complex or rare.



The Foundation's Vision is: Inspiring donors. Transforming health care. Saving lives.

Our Mission: Harnessing the power of philanthropy to significantly improve specialized health care and research for British Columbians.

Our Values: Initiative & Innovation. Integrity & Stewardship. Teamwork & Engagement.

Based at the VGH hospital site, the Foundation team is made up of over 70 dedicated fundraising and support professionals, working to connect the passion of philanthropists with the Hospital's greatest needs. The Foundation is led by an accomplished Board of Directors (<https://vghfoundation.ca/about/board-of-directors/>), which governs VGH & UBC Hospital Foundation and are ultimately responsible for our strategic direction and overall performance.

Fundraising Accomplishments

Thanks to our donors, the Foundation's 2019-20 consolidated revenue, including lotteries and investments, totaled \$82.6 million. Philanthropic support alone made up more than half of this total. With a fiscal year end of March 31, 2020-21 results are promising given COVID response funds and other key initiatives.

Our **Gift & Estate Planning program** is one of the largest and most credible programs in BC, if not Canada. Led by Charlene Taylor, a renowned leader in the Vancouver estate planning community, the GEP team works with donors who support the Foundation through thoughtful planning.

Estate planning raises over \$10 million in realized gifts every year, and has over 460 more identified expectancies with an estimated value of over \$131 million for healthcare in BC. With a very strong pipeline and ongoing referrals, we have thousands of prospects to engage further.

The GEP planning team is the Foundation's in-house resource for all complex gifts, partnering with internal collaborators such as peers from Major Gifts, Donor Relations, Marketing, and Proposals & Projects. We also work closely with a network of over 300 professional advisors, cultivated through personal relationships, events, and ongoing updates. These allied professionals are an invaluable source of donor referrals and advice, and help hold the program to its very high standards.

The team's work represents a range of relationships, timelines, and giving vehicles such as wills and estates, life insurance, public and private stocks, real estate, trusts, and TFSA's & RRSP's.

Foundation Accomplishments & Current Priorities

Our current fundraising priority areas include:

- **Brain Health:** Your brain is what makes you, you. It defines how you think, how you feel and how you function. When something goes wrong with your brain, it shatters your sense of being, and ripples out to family and friends. But it doesn't have to be this way. Donors have the opportunity to accelerate our pace of discovery and dramatically change lives with the launch of our Brain Breakthroughs campaign.
- **Surgery:** VGH and UBC Hospital are centres of surgical excellence, caring for 60% of all adult trauma cases in BC. With 50% of surgical patients from outside Vancouver, over 30,000 surgeries are completed each year — saving and improving the lives of our loved ones. But operating rooms and other surgical spaces at VGH are in need of upgrades to meet new operating standards and meet the needs of patients across the province. Our successful \$60 million Future of Surgery campaign raised funds for the goal of reducing wait times for surgical procedures, equipping the hospitals with groundbreaking technology, enhancing surgical spaces, and optimizing recovery for improved patient outcomes.
- **Cancer:** Treatment and research of the most complex cancers facing British Columbians takes place at VGH and UBC Hospital. Our focus is on world class research, prevention, diagnosis, treatment and cures of these complex cancers. We aspire to improve the patient journey and outcomes for all patients living with cancer through world leading personalized treatment and care.
- **Heart & Lung:** From arrhythmias to asthma, our specialists are leading the world in innovative heart and lung disease treatment and research. Asthma and chronic obstructive pulmonary disease (COPD) are among the main causes of sickness globally and cardiovascular diseases are the number one cause of death throughout the world. Our world leading specialists want to change that, right here in Vancouver.



- **Innovation:** Solutions to health care's greatest challenges won't come from one idea or person. They will come from a community of innovators and investors, using their time, talent, and financial support to create system-wide change. By connecting the power of philanthropy with the power of innovation we can accelerate health

care innovation in this province. Innovators' Challenge is one way we are currently working towards this future, by connecting philanthropists with some of the brightest researchers and innovators in Vancouver.

- **Community:** A full range of services outside of the hospital setting needs to be available to ensure all patients, including those who are marginalized, receive the right care at the right time in the right place – whether that be in their home, their neighbourhood or the hospital.

Additionally, public health is more important than ever, and with the current global pandemic Foundation supporters have been more important than ever. See our news page for the latest information: <https://vghfoundation.ca/latest/>

Looking ahead

Staff and leadership of the Foundation recently completed our new five year strategic plan, Roadmap to Success 2021 – 2025. Its three pillars, Engage, Grow, and Build, will guide our planning and growth for the coming years. The plan snapshot is appended, and some of the priority areas relevant for GEP include:



- Promote our program of bequests for legacy donors;
- Secure transformational gifts that are gamechangers for health care;
- Build the base of major donors who drive our strategic projects;
- Demonstrate the value of unrestricted gifts for the funding of key initiatives and urgent needs;
- Enhance our partnership with clinical leaders to embrace our grateful patients;
- Evaluate all fundraising initiatives to ascertain potential & realized return on investment.

For more information about the Foundation, see <https://vghfoundation.ca>.

ASSOCIATE DIRECTOR, GIFT & ESTATE PLANNING MANDATE & RESPONSIBILITIES

The Associate Director, Gift & Estate Planning is an exciting new role in our organization created to support and drive the program forward. Reporting to the Director, Gift & Estate Planning, the Associate Director's primary responsibilities are identification, cultivation, solicitation and stewardship of legacy giving donors and prospects, as well as building relationships with professional advisors in the community.

The Associate Director will manage one staff member and add additional team member(s), providing effective leadership and ensuring that they are developed and supported in their roles.

Key Responsibilities - The Associate Director

- In partnership with the Director, GEP, develops strategies and tactics for the cultivation and solicitation of top-ranked legacy giving prospects and donors and oversees the execution of these strategies by the GEP team.
- Plays a lead role in oversight of the overall legacy giving program, which includes bequests, tax and estate planning, present gifts, insurance, trusts and residual interests, and other vehicles.
- Works with Community Giving & Engagement and Major Gifts teams to ensure coordination and integration of relevant legacy giving activities.
- Works closely with Donor Relations as needed to ensure that legacy gift donors are provided with appropriate recognition and stewardship; develops and implements individual stewardship plans.
- Advises and assists prospective donors and their professional advisors in their charitable and estate planning efforts.
- Maintains accurate and current information on legacy giving activities, donors, and prospects using the donor database.
- Delivers regular status reports on revenue and expectancies to the Director.
- Mitigates risk by ensuring all necessary policies, standards and procedures are developed and monitored for the work carried out by the GEP team.

Relationship Management

- Develops and manages a portfolio of planned giving prospects and expectancies.

- Solicits planned gifts independently, as well as in collaboration with other members of the GEP and/or Major Gifts team.
- Provides leadership and direction to the GEP team to manage and execute activities for gift and estate planning, including developing and executing cultivation plans for prospects, stewardship of confirmed expectancies and relationship management with professional advisors.
- Builds, maintains, and cultivates new relationships with professional advisors in the community and serves as the primary liaison and advisor to internal and external constituents for all matters of legacy giving.
- Provides subject matter expertise to internal and external constituents for all matters of legacy giving.
- Fosters a strong spirit of collaboration in advancing gift planning strategies across the Foundation.
- Under executive direction, establishes financial goals and prioritizes key donors.

People Leadership

- To execute the Strategic Plan's emphasis on GEP, works with the Director to assess the program's staffing and HR needs, and develops and implements a plan to expand the team size.
- Provides strong and effective management and leadership to ensure that GEP team members are developed and supported in their roles.
- Motivates, inspires, guides and supports team members to understand long-term direction and contribute fully to the realization of the Foundation's goals and objectives.

Organizational & Occupational Knowledge

- Participates in relevant professional organizations and keeps abreast of current and state-of-the-art trends in fundraising and related operations, and assists in the implementation of emerging opportunities.
- Holds broad and extensive knowledge of the fundraising profession, estate planning for the sector, the non-profit industry and health care philanthropy.
- Maintains an understanding of best practices in philanthropy, updating job knowledge, participating in educational opportunities, reading professional publications, maintaining personal networks, and participating in professional association activities.

CANDIDATE PROFILE

The leaders, staff, and donors of the Foundation believe that the new Associate Director should be:

Donor-driven. An exceptional relationship builder. Proactive and defaults to action in engaging new prospects and encouraging dialogue. Strong customer service focus.

Collaborative. Thrives in a professional and high-functioning environment. Able to work harmoniously within a team. A willing partner to like-minded teammates. Able to educate Foundation colleagues on gift planning. Responsive and focused on internal customer service.

Ambitious and enthusiastic. An entrepreneurial self-starter. Strong desire to elevate the program. Creative and resourceful, with tact and respect to present ideas well. Assertive, resilient, and adaptable. Goal-driven. Works independently to meet goals.

A Team Leader. A thoughtful coach and guide. Motivates and inspires. Organized and structured, able to anticipate future needs and build team mechanisms for success. A fundraiser who models best practices.

Culturally Aligned. Committed to the Foundation's mission and vision. Appreciative of, and dedicated to, the long-term window of estate planning. Embraces learning and growth in themselves and others. Selfless and humble. Promotes diversity and inclusion, with strong cultural sensitivity.

Analytical. Can identify and articulate trends and strategy. Makes data-driven decisions and analysis. Strong data tracking and manipulation skills. Understands how to reach both broad and targeted audiences.

Ideal Position Skills and Competencies

- Proven experience in the art and science of planned gift and/or major gift fundraising.
- Adept at leading individuals and teams to success.
- Highly developed interpersonal and relationship skills; proven ability to exercise a high degree of good judgment, diplomacy, and discretion.
- Superior communication skills, including ability to write clear and compelling letters and proposals as well as make concise and engaging presentations.
- Emotional intelligence and maturity; handles end-of-life conversations with sensitivity and tact.
- Current member in good standing or willingness to join CAGP.
- Willingness to maintain memberships/attend training opportunities through appropriate professional organization to ensure expertise remains current.
- Able to attend social/business functions as required.
- The AD will need to be based in the Lower Mainland of BC.

Foundation-wide Core Competencies/Cultural Fit

- Initiative & Innovation: Envisioning the future, anticipating change, capitalizing on opportunities, and developing creative options that further the strategic direction of the Foundation.
- Integrity & Stewardship: Acting with intention, staying true to our values, and recognizing the impact on others.

- Teamwork & Engagement: Building engaging and effective working relationships to facilitate team success.
- Accountability: Taking responsibility for our actions and honouring commitments.
- Effective Communication: Accurately listening and understanding, and responding appropriately in both oral and written communications.
- Leadership: Creating an engaging climate, instilling a culture of excellence, and respecting all those we work with to enable the Foundation to reach its fullest potential.

APPLICATION AND SELECTION PROCESS

The Discovery Group, a leading Vancouver-based recruitment consultancy firm, has been engaged to support the Foundation's recruitment efforts for this important role.

All submissions should be received by March 5th 2021.

The selection process and interviews will take place through March and our goal is to have a new Associate Director start as soon as reasonably possible, and ideally no later than late spring/early summer of 2021.

Enquiries, expressions of interest, and confidential nominations are welcome.

To learn more or to apply, please contact Christoph Clodius, Vice President of The Discovery Group, at 604-836-1972, or VGHUBC@thediscoverygroup.ca.

We welcome applications from Indigenous persons, persons with disabilities, BIPOC and racialized individuals, persons of minority sexual orientation or gender identity, and others who may contribute to the Foundation's organizational diversity and who share the Foundation's values.

APPENDICES

Bio: Charlene Taylor, Director of Gift & Estate Planning



Charlene has worked in the charitable sector for more than 17 years in the area of Gift & Estate Planning. She has helped VGH & UBC Hospital Foundation grow its Gift & Estate Planning revenue from less than \$2 million annually to an average of \$10 million per year.

Charlene spent over 20 years in the private sector in the area of Estates and Trusts with one of the major financial institutions where she had built many deep meaningful relationships with professional advisors in legal, taxation, finance and wealth management and has been able to continue to strengthen and also build new relationships in the professional community at large.

Over the years, she has also dedicated much of her time to volunteer in the field of gift and estate planning. She chaired the Canadian Association of Gift Planners in 2007 and 2008, and chaired the Fraser Valley Estate Planning Council Membership Committee in 2006 - 2008. Charlene is an active member of the Vancouver Estate Planning Council, the Canadian Association of Gift Planners and a past member of the Fraser Valley Estate Planning Council.

OUR STRATEGIC IMPERATIVE

We are the leading charity investing in health care innovation in BC and we will continue to grow to meet the health care challenges of today and tomorrow.

- We are at a unique time of social and technological change; we have a vital opportunity to change the outcomes of disease, save lives and improve quality of life.
- Our changing community requires us to inspire and engage a new generation of donors that reflect our diverse communities.
- We are committed to innovation in health care through strategic grants in areas that matter to the community. As well, we will be agile in responding to emerging needs and opportunities.

VGH & UBC HOSPITAL FOUNDATION STRATEGIC PLAN: ROADMAP TO SUCCESS 2021-2025

Vision	Inspiring donors	Transforming health care	Saving and improving lives
Mission	Harnessing the power of philanthropy to drive health care innovation for all British Columbians.		
Values	Initiative & Innovation	Integrity & Stewardship	Teamwork & Engagement

OUR THREE STRATEGIC PILLARS

1. ENGAGE



AND INSPIRE THE COMMUNITY WITH COMPELLING AND IMPACTFUL PRIORITIES FOR IMPROVING HEALTH CARE

We will:

- With our primary partner, VCH, develop strategic projects that matter to our community
- Expand awareness of our mission to engage new donors and inspire and retain our existing funders
- Develop our network of volunteers, community influencers, physicians, VCH staff and leadership
- Convene the next generation of community and philanthropic leadership
- Evaluate the potential for partnerships with other organizations of common cause in improving health care
- Explore diversification of our revenue streams through innovation and social impact strategies

2. GROW



AND DIVERSIFY OUR COMMUNITY OF DONORS AND CHAMPIONS

We will:

- Secure transformational gifts that are gamechangers for health care
- Build the base of major donors who drive our strategic projects
- Grow our community of annual leadership donors who have collective impact on the mission
- Demonstrate the value of unrestricted gifts for the funding of key initiatives and urgent needs
- Promote our program of bequests for legacy donors
- Enhance our partnership with clinical leaders to embrace our grateful patients
- Evaluate all fundraising initiatives to ascertain potential & realized return on investment

3. BUILD



CAPABILITY AND CAPACITY TO DELIVER EXCEPTIONAL DONOR EXPERIENCES AND BE A RESPECTED AND TRUSTED LEADING CANADIAN CHARITY

We will:

- Be a diverse and inclusive organization that is connected to our communities
- Invest in the recruitment and development of our great team of people
- Leverage systems, processes and analytics that support fundraising, donor relations and operational efficiency
- Demonstrate the impact of the financial assets entrusted to us by donors
- Commit, as a learning organization, to empower people to identify and solve problems

OUR WORK IS TRANSFORMING HEALTH CARE AND WILL RESULT IN:



- Innovations in services, programs and technology to improve accessibility and quality



- World leading research in our centres of excellence



- Bringing leading medical and scientific people to British Columbia



- Providing state of the art clinical space and equipment



- Strengthening community and public health programs