



## Associate Director, Legacy Giving

Executive Profile Presented By



**VGH & UBC Hospital Foundation** is Vancouver Coastal Health's primary philanthropic partner, raising funds for specialized adult healthcare services and research for all people living in British Columbia. VGH & UBC Hospital Foundation is the leading charity investing in healthcare innovation in British Columbia, and partners with donors to raise essential funds for Vancouver Coastal Health, supporting VGH, UBC Hospital, GF Strong Rehab Centre, Vancouver Coastal Health Research Institute, and Community Health Services.

*The Foundation has had exceptional support from its legacy donors for years, with over \$10 million per year coming from estates and legacy giving, and hundreds of estates on file. Even with this success, there are over 6,000 legacy gift prospects that the Foundation would like to more closely engage.*

From this position of strength, the Foundation has created the **Associate Director, Legacy Giving** (AD) role to work within the community giving portfolio and manage this exceptional pipeline. Since over 60% of donors who confirm a gift in their will have made either their first or last gift through annual giving, we know how important annual and community giving programs are to legacy giving's success. The Associate Director will collaborate closely with annual, leadership, and direct response peers to bring a data-driven and donor-first approach to legacy giving.

The Associate Director will focus most intensely on donor activity and realizing donor dreams: identifying, cultivating, soliciting, and stewarding of legacy giving donors and prospects included within the Community Giving portfolio. This will also be enabled by having estate administration - following the realization of the bequest - managed by the Estate Administration Team.

The Associate Director, Legacy Giving will provide leadership to the Legacy Giving program and the Heritage Circle donor recognition society, and will manage a team of two.

**This is an exciting opportunity for an experienced fundraiser to:**

- Work with an established and credible team of fundraising leaders;
- Take ownership of a new and exciting program within the Foundation;
- Bring their legacy fundraising experience to an extensive and deep pipeline of prospects;
- Develop important donor relationships and fulfill compelling donor legacies;
- Build meaningful and productive relationships with Foundation colleagues, professional advisors in the community, and others in the gift planning community.

## Information for Candidates

This search is being led by VGH & UBC Hospital Foundation's search partner, Christoph Clodius at The Discovery Group.

If you or someone you know is interested or curious, please be in touch at [christoph@thediscoverygroup.ca](mailto:christoph@thediscoverygroup.ca).

All submissions should be received by May 16, 2025. Please apply to Christoph with a cover letter/expression of interest and resume/CV, in a combined single document.

*Candidates will be evaluated on an ongoing basis, so we are encouraging early and/or immediate applications and enquiries.*

### Compensation & Benefits:

The successful Associate Director can expect a starting salary between \$104,225 and \$118,438 depending on experience. Salary is reviewed annually for success factors such as skills, experience, and internal equity. Additionally, each year, the Foundation considers its overall performance and awards a bonus Organizational Performance Incentive. Once hired, employees have the opportunity for their salary to increase over time up to the maximum of the pay band, currently \$133,835.

The Foundation's top-notch total rewards package includes enrolment in the Municipal Pension Plan, dental and extended health benefits (with premiums paid by the Foundation), life insurance, subsidized access to the VGH fitness facilities, parking, transit, cycling centre and a Health Spending Account.

Vacation includes 4 weeks each year and eligibility for 9-day fortnights program in the summer months. The remote work policy allows individuals to work up to 10 days per year remotely and a hybrid work model is available (up to 50% of their time at home).

### Diversity, Equity & Inclusion & Belonging:

Through every part of the Foundation, we are committed to creating an equitable and inclusive workplace. We have a highly engaged cross-functional team that develops and continuously monitors policies, practices and experiences to support our journey of creating a workplace that continuously strives to improve. Guided by the input of our staff and best practices in the Global Benchmark for DEIB, our Culture Cabinet created (and received executive endorsement for) the Foundation's Diversity, Equity, Inclusion and Belonging Statement:

#### We're on a journey

At the Foundation, we know that "Harnessing the power of philanthropy to significantly improve specialized health care and research for everyone in British Columbia" requires a passionate, engaged, and diverse team that represents the communities we serve. Our journey of learning and acting on that learning will support our team members in uniquely contributing to our mission, and to feel that they truly belong.

Learn more here: <https://vghfoundation.ca/who-we-are/careers/>



## About VGH & UBC Hospital Foundation

### The Foundation's Vision:

Inspiring donors. Transforming health care. Saving lives.

### Our Mission:

Harnessing the power of philanthropy to significantly improve specialized health care and research for all people in British Columbia.

### Our Values:

Initiative & Innovation: We foster a culture of continuous improvement and creativity, driving advancements in medical research and care.

Integrity & Stewardship: We uphold the highest standards of integrity, ensuring transparent and responsible management of all resources entrusted to us.

Teamwork & Engagement: We believe in the power of collaboration, engaging with our community and partners to achieve common goals.

Based at the VGH hospital site, the Foundation's team of 100 works with an exceptional community of donors who contribute over \$40 million 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.

The Foundation is led by an accomplished Board of Directors which governs VGH & UBC Hospital Foundation and are ultimately responsible for our strategic direction and overall performance.

### History:

Since 1902, VGH has been pioneering medical advancements and providing exceptional patient care.

Learn more about the milestones that have shaped our legacy and continue to drive us forward:

<https://vghfoundation.ca/who-we-are/timeline/>



## Our Beneficiaries

### Vancouver General Hospital: Leading Comprehensive Health Care

Vancouver General Hospital (VGH) is the largest, most specialized hospital in BC and the number one adult health care referral centre. VGH is one of only two accredited Level 1 adult trauma centres in BC, caring for 60% of adult trauma cases. VGH cares for the most complex patient needs in BC, taking referrals from across the province. Nearly half the patients come from outside Metro Vancouver for advanced treatments that are only available here. 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.

### UBC Hospital: Innovative Care and Research Hub

UBC Hospital excels in patient-centered care and advanced research, offering specialized treatment for non-life-threatening emergencies and surgical care. The facility includes urgent care, short-stay day surgery, diagnostic imaging services, extended care, bladder care, brain research, sleep disorders, and a range of neurology clinics.

### VCH Research Institute: Driving Medical Research and Innovation

The VCH Research Institute leads in medical research and innovation, advancing health care through studies and collaborations aimed at improving patient outcomes. Comprised of acclaimed doctors, scientists, and researchers, the institute discovers new cures and treatments for many serious conditions and diseases.

### GF Strong Rehabilitation Centre: Premier Rehabilitation Services

GF Strong Rehabilitation Centre is BC's largest rehabilitation centre. It provides inpatient, outpatient, outreach and clinical support services to clients and patients. It offers four unique programs: Acquired Brain Injury, Spinal Cord Injury, Arthritis, neuromusculoskeletal and a Transitional Rehabilitation Unit.

### Vancouver Community Health Services: Comprehensive Community Health Care

Vancouver Community Health Services offers a wide range of health care programs and support services, ensuring accessible and quality care for all residents. The division emphasizes health promotion, prevention, primary, secondary, rehabilitative, and palliative care for all ages, from newborns to elders.

The Foundation's Key Impact Areas span 23 fields including Long-Term Care, Dementia, Women's Heart Health, Brain Breakthroughs, Cancer, Mental Health Support and Wellness, Stroke Health and Surgery to name a few. To learn more about them, see: <https://vghfoundation.ca/impact-areas/>

For more information:

About the Foundation, see: <https://vghfoundation.ca>.

2023 - 2024 Audited Financials: <https://vghfoundation.ca/who-we-are/audited-financial/>

Foundation Leadership: <https://vghfoundation.ca/who-we-are/executive-leadership/>

## The Role: Associate Director, Legacy Giving

The Associate Director is an essential member of the Community Giving & Engagement Division team, which overall includes legacy giving, fundraising events, direct response, community outreach and other annual giving tactics. The Division is focused on increasing revenues and expanding the number of donors who support the various organizations the Foundation funds.

More broadly, the Division is responsible for advancing VGH & UBC Hospital Foundation's mission through comprehensive engagement strategies that strengthen the community's trust in the Foundation. As a lead for the Foundation brand, the Division is responsible for building awareness of the Foundation and the need for philanthropic support. It is the driving force behind communicating the Foundation's impact on the health care innovation for all those that live in BC.

Reporting to the Director of Community Giving and Engagement, the Associate Director, Legacy Giving will provide leadership to the Legacy Giving program and the Heritage Circle donor recognition society. Leading a team of two, the Associate Director will identify, cultivate, solicit, and steward legacy giving donors and prospects included within the Community Giving portfolio.

The AD and their team will collaborate very closely with annual and leadership giving and Asian Strategy peers in the Division, with Estate Planning colleagues, and the major gifts team as appropriate. In collaboration with the Estate Administration Team, the AD will ensure confirmed expectancy donors are stewarded and engaged in Foundation activities to ensure ongoing annual and future giving.



*The AD will be exceptionally well-positioned for success. Through various third-party lead generation programs and our own donor engagement, we currently have 6,000 legacy prospects, including a top 1,500 who have attended events or otherwise indicated deeper interest in leaving a legacy.*

The Director of Estate Administration and Gift Planning, Charlene Taylor, has had a long and successful career at the Foundation and has established an incredible network of professional advisors and donors. As the leader of the Estate Administration team and a member of the Philanthropy & Campaign Division, her team oversees estate administration, stewardship of professional advisors, works closely on Campaign planning, complex gifts, and a small portfolio of long-term high-value prospects.

The Foundation has confirmed expectancies valued at \$235 million, with more than \$12 million realized in the past year.

## Key Responsibilities - Associate Director

The general duties outlined above can more specifically be detailed as follows:

### Position Impact

- Provides strategic direction for the Legacy Giving program and leads in the creation, design, and execution of the Foundation's legacy giving strategies, including establishing goals and developing metrics to measure ongoing success and ROI.
- Responsible for the growth of confirmed expectancies and Heritage Circle donors.
- Ensures the legacy giving program reflects industry best practices and maximizes charitable contributions through various gift planning vehicles, which may include bequests, tax and planning, present gifts; insurance, trusts and residual interests.
- Collaborates with other fundraising teams to ensure that legacy prospecting and solicitation activities are integrated with other Community Giving and Major Gift touchpoints and that communications align with the Foundation brand.
- Leads all legacy prospecting activities in coordination with Annual Giving team, including direct response mailings and digital activities.
- Internal resource as a subject matter expert for colleagues regarding legacy and estate planning.
- Responsible for budget development, monitoring, reporting, benchmarking and the creation of annual work plans, as well as future realized gift forecasting.

### Business Solutions

- Utilizes analytics and modeling tools to identify prospects and develops strategies and implements tactics for the cultivation and solicitation of top-ranked legacy prospects and donors.
- Ensures that donors of legacy gifts are provided with appropriate recognition and stewardship by working closely with Donor Relations to develop and implement individual stewardship plans.
- Advises and assists prospective donors and their professional advisors in their charitable and estate planning efforts.
- Maintains accurate and up-to-date information on legacy giving activities, donors, and prospects using the CRM system and supplementary tools.
- Mitigates risk to the Foundation by ensuring all necessary policies, standards and procedures are developed and monitored for the work carried out by the Legacy Giving Team.

### Relationship Management

- Develops and manages a portfolio of planned giving prospects and expectancies.
- Provides leadership and direction to the Legacy Giving 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.
- Solicits planned gifts independently as well as in collaboration with other members of the Community Giving and/or Major Gifts teams.
- Builds, maintains, and cultivates new relationships with professional advisors in the community and serves as a liaison and advisor to internal and external constituents for all matters of legacy giving.
- Fosters a strong spirit of collaboration in advancing gift planning strategies across program boundaries.
- Coordinates legacy donor management flow with the Estate Administration Team.

### People Leadership

- Assumes the full range of management accountabilities in relation to the Legacy Giving program, which includes team supervision.
- Provides strong and effective leadership and ensures that team members are developed and supported in their roles.
- Motivates, guides, and supports team members to understand long-term direction and contribute fully to the realization of the Foundation's goals.

### Organizational & Occupational Knowledge

- Participates in 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, 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.

### **Role Specific Competencies:**

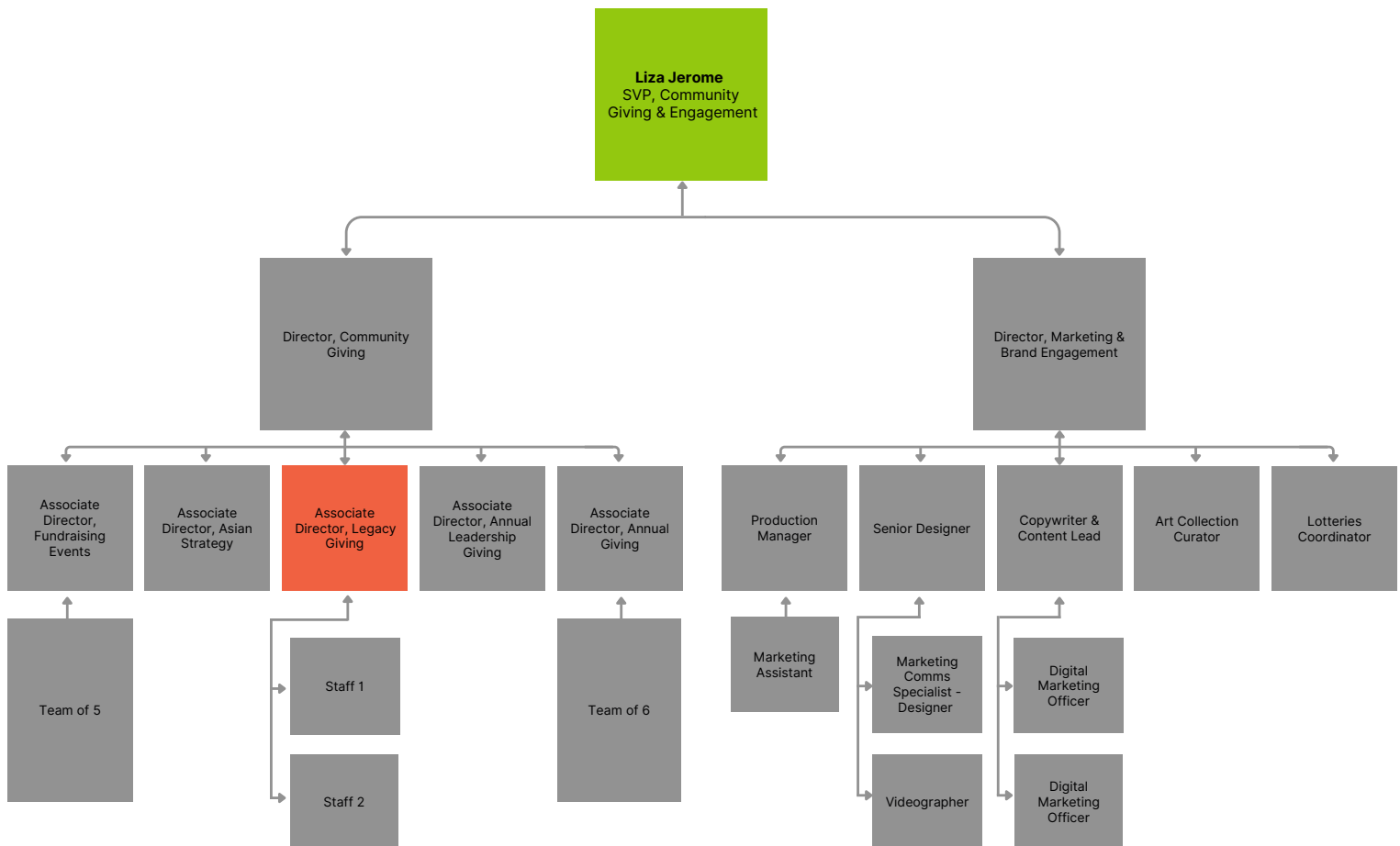
- Proven experience in the art and the science of planned gift fundraising, possessing a deep understanding of the various planned giving vehicles available and how to determine the best fit for prospects and donors based on their tax and philanthropic motivations.
- Knowledge of planned giving vehicles, current trends in philanthropy, and basic estate and financial planning for individuals, including tax implications of charitable giving.
- Proven ability to lead and coach individuals and teams to success.
- A builder by nature, keen to move forward with persistence, tact, and initiative.
- Adaptability and flexibility to thrive in a changing and evolving organization, focused on the future and nimble in thinking.
- Enthusiasm and drive to own the legacy giving program. Self-motivated, resourceful and able to work independently to meet goals. Familiarity with direct response methods, data analysis, and interpreting trends.
- Highly developed interpersonal and relationship skills. Highly empathetic and authentic in dealing with donors in a very sensitive stage of life. Comfort in managing end-of-life and related conversations.
- Proven ability to exercise a high degree of good judgment, diplomacy and discretion.
- Enthusiastic, passionate and dedicated to building upon a strong existing planned giving program to secure a solid growth trajectory for the future.
- Superior communication skills, including ability to write clear and compelling letters and proposals and make concise and engaging presentations.
- Excellent analytical and organizational skills.
- Ability to work harmoniously within a team.
- Willingness to maintain memberships/attend training opportunities through appropriate professional organization to ensure expertise remains current.
- Willingness to attend social/business functions as required.
- Current member in good standing or willingness to join CAGP.



### Foundation-wide Core Competencies:

- 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.

## Org Chart - Community Giving & Engagement





## Navigating complex challenges for social profits

The Discovery Group is an international consulting firm dedicated to the social profit sector. We believe that social profit organizations can change the world. Since 2017 it has been our mission to help social profits across the globe achieve their vision and elevate community impact. We work side-by-side with our clients to help them envision change, determine how to make it happen, and put the necessary tools and skills in place for success.

[www.thediscoverygroup.ca](http://www.thediscoverygroup.ca)

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