



Development Officer, Legacy & Planned Giving

The diagnosis of a serious or life-limiting illness has profound effects on a person, their family, and friends. For more than 40 years throughout the greater Victoria area, Victoria Hospice has been caring for the dying, and supporting those who love them.

We support patients and loved ones on their journeys through life-limiting illness and bereavement. Victoria Hospice Society's mission is to enhance the quality of life for those facing advancing illness, death, and bereavement through skilled and compassionate care, education, research, and advocacy. Our desire is to provide exceptional end-of-life care for all.

Fundraising provides a substantial part of the organization's budget, and planned giving is particularly important. The Development Officer, Legacy & Planned Giving, therefore plays an integral part of Victoria Hospice's fundraising team, carrying out initiatives that support Victoria Hospice Society's programs of care.

The Development Officer, Legacy & Planned Giving (DO) will have sole responsibility for all donor relationships related to legacy and planned giving, leading with compassion and care to develop sincere and authentic connections to the organization. The DO manages the program, leads estate administration, markets the program broadly, and is a collaborative and supportive colleague.

Victoria Hospice donors are incredible, and most will have had or are going through a profound life experience. It follows that conversations about legacies and planning happen often and naturally. The Hospice has a strong legacy program on which to build, so this is a unique and compelling opportunity for a fundraising professional to:

- Join a close-knit, caring, and supportive community of Hospice staff and volunteers
- Leverage Victoria Hospice's reputation and feelings of appreciation
- Elevate an already strong planned gift program
- As the in-house gift planning expert, have authority and autonomy over their program area
- Support the Hospice's planned capital campaign
- Play a pivotal role in the community's evolving Hospice needs

VICTORIA HOSPICE

For more than 40 years, Victoria Hospice has been caring for the dying and supporting those who love them through programs including:

- Palliative and respite care at Victoria Hospice's 18-bed inpatient unit in the Richmond Pavilion of Victoria's Royal Jubilee Hospital. Victoria Hospice provides end-of-life care focused on palliative treatment. Our interdisciplinary team provides comfort for patients and support for their family.
- 24-hour crisis intervention by the Palliative Response Team for approximately 400 end-of life patients annually who are dying at home, and their families
- Counselling and spiritual care for patients and families before death occurs
- Grief and bereavement counselling & support groups after death occurs. Our bereavement team also offers counselling to anyone in the community who is suffering loss, regardless of whether their loss is connected to care provided at Victoria Hospice
- Internationally renowned education & research programs to advance the field of palliative care. For health care professionals, we provide publications, courses, and clinical tools to assist in the provision of expert palliative care. We also provide public education workshops and resources and training to hundreds of volunteers, both clinical and non-clinical, who give their time at Victoria Hospice

Dedicated Hospice nurses, doctors, counsellors, and others—helped by more than 300 volunteers—provide care to nearly 1,000 end-of-life patients (and their loved ones) each year. The Society employs the equivalent of 63 full-time professional staff working in direct patient/family care, education and research, volunteer management, fundraising, finance, and administration.



Our Main Areas of Care

- Patients and Families: For everyone facing the end of life, we are here to enhance the quality of life by providing care, compassion, and comfort.
- Bereavement Services: Our professional counsellors and highly-trained volunteers are here to help individuals and families navigate their grief journeys.
- Professional and Community Education: We help health care professionals advance their knowledge and skills in the field of hospice and palliative care. We also offer programs for the public on topics such as grief and death literacy and advanced care planning.

What Guides Us

- Our Vision: Quality palliative and end-of-life care for all.
- Our Mission: To enhance the quality of life for those facing life-limiting illness, death, and bereavement through patient and family-centred care, education, research, and advocacy.
- Our Values: Respect, Compassion, Integrity, Commitment, Collaboration, Excellence. Our values are the foundation of our culture and our working environment. Through them, we remain focused on maintaining a patient and family-centred caring work environment.

Victoria Hospice recently achieved accreditation with commendation from Accreditation Canada following a thorough assessment of our services and evaluation against national standards, and we are one of Charity Intelligence's Top 100 charities in 2021.

For more about Victoria Hospice, see <https://victoriahospice.org>. Our 2020/21 Annual Report can be found [here](#).

Strategic Framework 2019-2024: Growing our Circle of Care.

We face a significant increase in demand for our specialized palliative and end-of-life care services in the coming years. Now more than ever, Victoria Hospice must leverage our expertise, harness our resources, and expand our capacity to meet the growing needs of our community.

This framework provides inspiration and guides our work in service to our patients, their families, our partners, and our communities.

For fundraising purposes, its objectives include "Diversify funding from government and private sources" and "Foster a culture of philanthropy in all aspects of Victoria Hospice."

To see the full strategic Framework, click [here](#).

Looking ahead

We are currently in the early planning stages for a capital fundraising campaign to support a new dedicated location. Victoria Hospice currently operates from the Richmond Pavilion of the Royal Jubilee Hospital. The building is more than 70 years old, and (without significant renovations) is no longer ideal for clinical care.

We will pursue a new location that is both welcoming and peaceful for our patients and their families, while offering a clinical environment that meets modern health care and safety standards.

The new location will house Victoria Hospice's inpatient beds and associated program areas, as well as providing a hub for our expanded community programs and services.



Fundraising & Financials

Victoria Hospice has a budget of over \$9 million, about half of which is provided by our generous donors through planned and legacy gifts, event supporters, outright gifts, and other support.

Last year we were honoured to have over 5,500 people support Victoria Hospice financially.

This philanthropic support is critical to our ongoing operation and the outpouring of generosity throughout the pandemic was truly heart-warming.

Our planned giving program is crucial to Hospice's ability to deliver services, and realizes on average \$1.7 million per year. We have nearly 300 expectancies on file, and hope to grow this number by 25-30 every year. Legacy Donors are recognized through our Heritage Circle giving club, members of which receive special invitations and updates to honour their commitment to Hospice.

Victoria Hospice has an affiliated Foundation with over \$19 million in investments, providing the organization with long-term stable funding and seed funding for urgent or capital needs.

THE DEVELOPMENT OFFICER ROLE

The Development Officer, Legacy & Planned Giving (DO), is responsible for the development, implementation, and management of the planned giving program. The DO draws upon their high level of charitable gift planning expertise to motivate prospective donors and lead cultivation, solicitation, and stewardship.

They will manage a portfolio of individual donors and prospects, and the ongoing administration of estates. The DO plays an important role in Victoria Hospice's donor communications, including newsletters and e-newsletters, and assists with major donor cultivation as required.

The Development Officer, Legacy & Planned Giving is an integral part of the development team and partners with other fundraising and communications colleagues on other initiatives as needed. Reporting to the Director of Fund Development, the DO participates at a high level in the annual planning and budgeting of fundraising activities each year.

Specific Responsibilities:

Legacy and Planned Giving

- Build meaningful relationships with Victoria Hospice's planned gift prospects and donors
- Identify and cultivate planned giving prospects, providing opportunities to engage authentically with the organization
- Support Hospice volunteers and staff in managing planned gift enquiries as the "first point of contact" with Hospice clients
- Maintain all gift records, including tracking and reporting planned gifts in Raiser's Edge database
- Perform statistical analysis of data and records as required
- Plan and implement stewardship of all legacy donors and Heritage Circle members in particular.
- Provide regular progress reports to the Director of Fund Development
- Strategically partner with the Director of Fund Development on blended (major & planned) gifts, or facilitate legacy donors as major gift prospects, and vice-versa
- Maintain a high level of charitable gift planning expertise and trends, including tax aspects and new legislation, through ongoing professional development, networking, and independent research.

Marketing and External Relations

- Develop and implement an annual marketing plan that may include, but is not limited to:
 - Participation in relevant planned giving sector initiatives (i.e. Leave a Legacy Month; Make a Will Week, etc.)
 - Research and determine appropriate ads in 3rd party donor marketing publications (i.e. BC Planned Giving Guide; Canadian Donors Guide, etc.)
 - Presentations for prospective donors, professional financial and estate planners, and other constituencies
 - Work with Communications & Marketing, participating in the creation of donor newsletters, e-newsletters, and other print materials and communications
 - Solicit and write donor stories and articles for marketing purposes (i.e. for Transitions, Hospice Connections, Hospice Matters, social media, ad campaigns); deploy them as part of the plan and as opportunities arise
- Identify and cultivate relationships with professional advisors, making them aware of, and keeping them up to date, on the services and programs at Victoria Hospice, as well as opportunities for funding by their clients
- Plan, draft, and deliver an annual planned giving survey to Victoria Hospice planned giving prospects; analyze results and follow up on requests, commitments, and donor stories as appropriate
- Identify and implement new legacy opportunities wherever possible.



Organization & Estate Administration

- Manage the ongoing administration of active estates through timely and effective communications with estate lawyers and executors, ensuring all estates are being properly administered by the executor/trustee in a timely, appropriate, efficient, and fiduciary manner
- Participate in the annual strategic planning and budgeting processes
- Record estate gifts and ensure that the Raiser's Edge database is properly maintained with prospects, confirmed expectancies, and other planned giving donors
- Deploy best practices in moves management with donors and allied professionals alike
- As a key member of the staff, attend Victoria Hospice events as appropriate.

CANDIDATE PROFILE

Skills & Abilities & Personality

The ideal new DO will possess the following traits:

- Personable, outgoing, and genuine
- Demonstrated ability to successfully plan, organize, and manage a relationship-based fundraising program
- Passion for Hospice's mission, and empathy for patients and family needs and experiences
- An authentic interest in people's stories and experiences, sincerity, and sensitivity
- Strong alignment to Hospice's values
- Understanding of the interconnections and interdependence between planned giving, major giving, events, annual giving, and other channels
- Nimble, able to deal with change & uncertainty
- Ability to work effectively with a variety of internal and external contacts including staff, visitors, volunteers, donors, and Board members
- Strong team orientation and collaborative by nature
- Sound judgment and the ability to handle matters of a sensitive and confidential nature
- Strong administrative, organizational, and time management skills
- Ability to work in a fast-paced environment and meet deadlines, complemented with the ability to take direction and show initiative as appropriate
- Strong written and oral communication skills
- Willingness and enthusiasm for continual learning

- Ability to work flexible hours when required, and travel locally to participate in donor meetings and events

Education, Training, and Experience

Being successful in this role will depend on:

- Meaningful experience in fundraising, particularly legacy & planned giving or major & leadership gifts
- Experience working with a non-profit organization
- Familiarity with tax aspects of charitable gifts and legislation affecting such gifts
- Familiarity and comfort with Word, Excel, and donor database software (specifically Raisers Edge)
- Membership in, or willingness to join, the Canadian Association of Gift Planners
- Post-secondary education or equivalent education, experience, and training.

APPLICATION AND SELECTION PROCESS

The Discovery Group, a leading recruitment consultancy specializing in the social profit sector, has been engaged to support Hospice's recruitment efforts for this important role.

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 christoph@thediscoverygroup.ca.

All submissions should be received by January 28, 2022.

Victoria Hospice offers a substantial and comprehensive compensation package, including generous holidays, extended medical and dental coverage, membership in the Municipal Pension Plan, and professional development support. The successful DO can expect a competitive salary between position \$62,642 - \$90,048 depending on experience.

Applications are invited from all qualified individuals inclusive of disability, culture, ethnicity, race, gender identity and expression, nation of origin, age, or religion.

This position is covered by the Provincial Health Officer's mandatory COVID-19 vaccination order, so as part of our commitment to the health and safety of our community, we require all employees to be fully vaccinated against COVID-19.