

children's HEALTH FOUNDATION OF VANCOUVER ISLAND

LEADERSHIP AND LEGACY GIVING MANAGER

Children's Health Foundation of Vancouver Island has invested in the health of Island kids for more than 90 years. Our vision is to ensure all Island kids have access to the health care they need. We believe the best way to give kids, youth, and their families access to care is by funding programs and initiatives in three main areas: Early childhood development, youth mental health, as well as children and youth living with complex needs.

Thanks to the generosity of our donors, we can bring supports closer to home and help transform the lives of children and youth living with physical and mental health challenges.

As the Foundation grows and evolves, we have an exciting opportunity for a new Leadership and Legacy Giving Manager to join our passionate and dedicated team. The Manager's responsibilities are twofold: first and more importantly, build on a successful planned and legacy giving program; and secondly, develop relationships with individual donors with broad interests in the Foundation. The Manager is expected to spend most of their time directly engaging with prospects and donors.

This is an exciting opportunity for a fundraiser who is passionate about children's health to:

- Build the Foundation's excellence in legacy giving;
- Have the chance to deploy their creativity and take calculated risks;
- Join an excellent team and well-run organization;
- Work directly with a passionate and highly regarded CEO;
- Join the only organization dedicated to fundraising for children's health on Vancouver Island.



Grand Opening of Qw'alyu House, Campbell River, Summer 2021



We're here for Island kids

There is no greater gift than our children. And nothing is more vital than their health.

Children's Health Foundation of Vancouver Island has invested in the health of Island kids for more than 90 years. We're here to harness the collective compassion of thousands of donors each year so that together, we can improve the lives of children and youth living with physical and mental health challenges – in every Island community.

Our vision is to ensure all Island kids have access to the health care they need.

We collaborate with medical experts, health care professionals, First Nations, school districts, and community partners to identify service gaps and barriers that impact care. Together, we develop solutions – and we're unrelenting in our quest to achieve sustainable, transformative change. Last year, with the help of our generous donors, the Foundation touched the lives of 15,753 kids, youth, and families across Vancouver Island and the surrounding islands.

Our History: Here for Island kids since 1926

Our story dates back to 1922, when a Hornby Island parent fought to bring care for her stepdaughter closer to home. Five years later, her relentless activism and the generosity of hundreds of donors and volunteers led to the opening of a Children's Hospital, the Queen Alexandra Solarium for Crippled Children, located on the Mill Bay waterfront. It became a centre of excellence for children living with complex physical challenges, bringing help and hope to Island kids and their families. After relocating to its current location in Victoria in 1958 to offer care, treatment, and rehabilitation to even more Island children, the facility changed its name in 1973 to become The Queen Alexandra Hospital for Children (QA), acknowledging that children should not be defined by their illness.

The Queen Alexandra Foundation for Children was established in 1984 as a catalyst for the community to show its support for families whose children receive care at QA. In 2012, the Foundation changed its name to the Children's Health Foundation of Vancouver Island to better reflect its Island-wide mandate and evolving areas of focus.

Even though the names and places have changed over the decades, our Foundation will always remain connected to this proud history, and the compassionate volunteers and donors who have made it what it is today.

Most recently, we have solidified our operations around Vancouver Island to be sure we can reach as many children as possible. We just opened Q*alayu House, our brand-new home away from home in Campbell River, which will welcome families from the north Island region and the surrounding islands who need to travel to Campbell River to access maternal and pediatric care. Since the launch of the Foundation's Q*alayu House fundraising campaign in 2019, the Vancouver Island community has come together to raise most of the \$7 million goal.

How do we help?

- Early childhood development: Enabling access to resources, supports, and therapies to ensure children thrive and reach their developmental milestones from prenatal to age six.
- Youth mental health: Supporting services and experts that reach youth any time throughout their mental health journey.
- Children and youth living with complex needs: Helping families access multiple services, therapies, and specialists to address the complex needs of their children from birth into young adulthood.



We do this through:

- Home away from Homes, like Jeneece Place and Q*alayu House;
- Bear Essentials, to help offset health expenses for children (<https://islandkidsfirst.com/bear-essentials/>);
- Targeted Strategic Granting & Program Funding, and Endowed Bursaries;
- And many other funding programs, partnerships, and collaborations.

The Foundation raises on average \$3.5 million annually from over 2,500 active donors every year. This support, combined with our \$47 million in assets, means we have a strong and stable foundation from which to grow.

To learn more, see <https://islandkidsfirst.com>.

LEADERSHIP AND LEGACY GIVING AT CHFVI

The legacy giving portfolio has been very successful in recent years, with a five-year average of over \$600,000 realized every year, including several \$1 million+ estate gifts. We have a dozen estates in administration, and another 36 known commitments. Our robust portfolio of loyal annual and monthly donors bodes well for the program's future success.

In Leadership giving, the Manager will work with individual donors and grant-making organizations with varying interests and capacity of \$10,000 and above. While some major gift donors are focused on the Foundation's capital campaign priorities, many of our donors have interests in our programs and other initiatives – cultivating these donors and growing the portfolio is the purview of the Manager, Leadership & Legacy Giving.

The Manager will partner closely with, and report to, the CEO, Veronica Carroll – a dedicated fundraising and community leader (see her bio in the Appendix). The Foundation's peer fundraisers, the Annual Giving Manager & Capital Campaign Manager, are collaborative and dedicated to the Foundation's success. The Manager will also partner across departments, including others in Fund Development, Communications, and the Community Investment Team.

MANAGER DUTIES AND RESPONSIBILITIES

Legacy Giving

- Oversee CHFVI's legacy giving program that includes the cultivation, solicitation, and stewardship of legacy donors.
- Identify new and creative methods, or tools to deepen legacy donors' opportunities and engagement in CHFVI.
- Respond to planned giving inquiries and follow-up with appropriate documentation, as appropriate, to encourage donors to consider leaving a legacy with CHFVI.
- In collaboration with the Communications Department, establish the annual legacy giving program collateral and marketing plan.
- In collaboration with the Fund Development Officer, Donor Services, develop and implement a legacy giving prospecting system.
- Ensure all estate administration and tracking systems are effective and accurate.
- Establish and maintain relationships with allied professionals, both for the purposes of advising on complex gifts as well as donor identification and referrals.
- Develop and maintain relationships with professional peers across the planned giving community, to stay aware of new innovations and mutual support.
- Partner with external service providers as appropriate.

Leadership Giving

- Develop and implement personalized cultivation and solicitation plans for approximately 25 – 35 donors and prospective donors, which include individuals, corporations, and family foundations.
- Engage in face-to-face meetings and personalized contact activities.
- Ensure that donors receive impeccable and personalized stewardship, through tailored correspondence, reports, and updates in a timely and professional manner.
- Prepare and coordinate fundraising materials such as proposals, briefing notes, presentations, call reports, letters, and other documents/materials.
- Conduct regular portfolio reviews to ensure that relationships are advancing and donor development activities are on track.
- In collaboration with the Development Officer, Donor Relations, maintain and properly record information about prospects and donors, utilizing CHFVI's Raiser's Edge database.

Support an Integrated Approach to Development

- Develop structure for mid-major gift level giving programs and recognition circles.
- Develop strategies to deepen relationships with members, mid-level donors and key stakeholders.
- Seek opportunities to encourage major gift supporters to participate in other development and CHFVI programs, such as sponsorship, fundraising events, special appeals, and hosting activities.
- Occasionally lead the development of mid-major level major gift cultivation/stewardship events or initiatives, working in collaboration with other CHFVI staff.
- Identify fundraising opportunities to expand and grow development results.

- Participate in supervising and supporting Fund Development interns with comprehensive fund development efforts.
- Promote a culture of philanthropy at CHFVI by working collaboratively with board members and leading experts in fields of CHFVI's impact areas to support the development and deepening of relationships with major gift donors and prospects.

Major Gift and Legacy Giving Administration & Analysis

- Measure and analyse regional Major Gift and Legacy Giving revenue development activities to identify areas for improvement and growth.
- Maintain integrity of the regional revenue development database by complying with policies and procedures for data collection and entry systems; ensuring that selected volunteers are proficient in the application of the database.
- Analyse and report on the progress of assigned Major Giving and Legacy Giving campaigns including the compilation of statistical and other reports.
- Develop, maintain, and evaluate an engagement and stewardship calendar inclusive of diverse opportunities for varying levels of stakeholders, volunteers, and donors.
- Greet and support donation deliveries/interactions at the office.
- Identify opportunities for cross-promotion between major gift/leadership giving and annual giving.

Operational Planning and Budgeting

- Collaboratively set annual revenue and stewardship goals and develop an annual work plan with Development and Communications colleagues.
- Contribute to developing a fundraising strategy of income-generating activities for the major gift and legacy giving program, drawing on knowledge of fundraising best practices, to meet or surpass revenue goals.
- Develop and set annual budget (revenue and expense) in consultation with and approval from the CEO while providing regular forecasts.
- Develop and report on KPIs to monitor progress, modifying activities as needed to reach target goals.
- Evaluate and provide progress updates to colleagues at regular meetings.

CANDIDATE PROFILE

- Relational: capable of developing deep and meaningful professional relationships with donors of all backgrounds and intents.
- Interpersonal skills: social sensitivity; approachability; building and maintaining relationships.
- Communication: clear verbal and written communication; effective listening.
- Teamwork: sharing information freely; asking for help; flexibility to pitch in.
- Open-mindedness: open to others' ways of approaching situations; works with shared agendas.
- Accountability: follows through on responsibilities and commitments; reliable and dependent.

- Confidentiality: maintains details appropriately; shares sensitive information with appropriate parties.
- Creative Thinking: sees opportunities for new ways of working; brings a fresh perspective and identifies unorthodox approaches to situations.
- Daring: comfortable taking risks and trying new things; being a self-starter and initiating activities; challenges the status quo.

QUALIFICATIONS, SKILLS, EDUCATION, AND EXPERIENCE

Desired Skills & Experience

- A strong donor service orientation demonstrated by the ability to anticipate, understand, and respond to the needs and expectation of donors.
- Significant progressive fundraising experience, including a successful track record of achieving revenue targets, ideally at least 3 years' relevant experience.
- Demonstrated experience working with robust donor portfolios; success or exposure to an effective legacy gift program will be particularly welcome.
- Previous success efficiently building rapport with both senior business and community leaders and leading individual philanthropists that translated into successful gift commitments.
- Experience working with a diverse array of stakeholders, including key volunteers to support fund development objectives.
- Superior written communication and presentation skills.
- A high level of organizational ability, attention to detail, and ability to manage tight timelines.
- Experience with Raiser's Edge data system and extracting data to support fund activities along with a solid knowledge of Microsoft Office programs is valuable.

Qualifications & Education

- University degree in a relevant area, or equivalent experience.
- Involvement in the Canadian Association of Gift Planners (CAGP) is particularly welcome, as is any of the Association of Healthcare Philanthropy (AHP), Association of Fundraising Professionals (AFP), or a similar professional organization.
- Certified Fund-Raising Executive (CFRE) designation or in progress is an asset.

Working Conditions

- 7.5 hr workday / 37.5 hr work week.
- Evening and weekend work required at times for special events and presentations.
- Transportation to attend meetings, events, and presentations on an as-needed basis.
- While the incumbent must be based within the Victoria area, flexible relocation timing will be considered given current public health guidelines on travel and movement.

APPLICATION AND SELECTION PROCESS

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.

Applications are requested by October 8, 2021. We encourage early applications, as candidates will be screened on an ongoing basis, with the goal of having the role filled as soon as possible.

CHFVI provides a comprehensive compensation package which for the Manager role includes: salary range between \$62,000 - \$91,000; an excellent extended medical and dental health coverage; enrollment in the Municipal Pension Plan; and an organization-wide commitment to professional development.

The Foundation welcomes applications from all qualified individuals, including, but not limited to persons with disabilities; racialized persons; First Nations, Inuit, and Métis; and persons of any gender identity and sexual orientation. The Foundation is committed to providing an inclusive and barrier-free recruitment process and work environment.

All qualified candidates are encouraged to apply, however Canadians and Permanent Residents will be given priority.

APPENDIX: Veronica Carroll, CEO



Veronica Carroll is the CEO of the Children's Health Foundation. With both an MBA in Management Consulting and over two decades as a Certified Fundraising Executive, Ms. Carroll has a proven track record of philanthropic success and is a highly respected leader in Canada's philanthropic community.

Ms. Carroll has over 30 years' experience raising funds for pan-Canadian, provincial, regional and community health-related charities, environmental causes, and social service agencies. In her most recent leadership positions in healthcare philanthropy, Veronica has successfully raised capital campaign funds for medical equipment and new acute healthcare buildings and improvements supporting three health authorities in British Columbia.

As CEO of the Children's Health Foundation, over the past five years Veronica has championed a total deployment of \$22 million in donor dollar grants to the three impact areas supporting access to healthcare services and programs across Vancouver Island and the Gulf Islands. In addition, during the onset of covid restrictions, Veronica and her team launched a \$7 million-dollar capital campaign to build and operate Q^walayu House, a Home Away From Home in Campbell River, which opened to the first family in late August 2021.