

# SEARCH PROFILE



**University  
Hospital  
Foundation**

**UNIVERSITY HOSPITAL FOUNDATION**  
**DIRECTOR, PLANNED GIVING**

NOVEMBER 2017

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Talent<sup>®</sup>**

## THE UNIVERSITY HOSPITAL FOUNDATION

The University Hospital Foundation (UHF) believes in the power of generosity to change and save lives.

Established in 1962 and governed by a volunteer Board of Trustees, the Foundation has evolved into one of the most successful hospital fundraising organizations in Canada and is recognized as a “high performer” by the Association for Healthcare Philanthropy’s (AHP) Performance Benchmarking Service. As a result of very generous individuals and community support, the UHF has raised more than \$177 million in the last 10 years to support patient care, advanced technology and clinical research. The Foundation also holds \$143 million in donor funds (\$79 million in established & \$64 million in non-established). The University Hospital Foundation values the opportunity to compare the Foundation to that of their peers, and consistently seeks to improve efficiencies and impact.

As prudent stewards of donor dollars, the University Hospital Foundation works diligently to efficiently and effectively raise and manage gifts. As well as ensuring that donations make the most significant impact possible, the Foundation strives to give donors confidence that their donations are wisely spent through comprehensive and transparent financial reporting.

The University of Alberta Hospital site is renowned for many areas of specialization which include central and northern Alberta’s only Level 1 trauma centre; world class neurosciences and cardiac sciences programs; one of only two dedicated burn units in Canada; and Canada’s busiest multi-transplant program. Donor gifts to the University Hospital Foundation support advancements in patient care, fund innovative clinical research and education, and help purchase advanced medical technology that leads to faster and more accurate diagnosis and treatment.

The University Hospital Foundation works closely with the leadership teams at the University Hospital, the Mazankowski Alberta Heart Institute, and the Kaye Edmonton Clinic (all located in Edmonton).

For further information on the University Hospital Foundation, please visit: [www.GiveToUHF.ca](http://www.GiveToUHF.ca).

## DIRECTOR, PLANNED GIVING

Reports to:	Vice President Philanthropy
Direct/Indirect Reports:	One direct report, and administrative support provided.
Location	Edmonton, Alberta

## THE INDIVIDUAL

Are you a proactive, confident self-starter that thrives in a competitive and fast-paced environment? The University Hospital Foundation is looking for an individual who is tenacious, persistent and driven to succeed.

The successful candidate will have the following qualities:

- Self-motivated, self-sufficient and driven to achieve success;
- Strong communication and interpersonal skills, friendly, comfortable, and gracious in social settings;
- Persuasive, outgoing and confident;
- Persistent, organized and accurate; and
- Possesses the highest standards of personal and professional integrity.

## MANDATE

The Director of Planned Giving directs and oversees a comprehensive program of planned giving at the University Hospital Foundation (UHF), focused on the identification, cultivation, solicitation and stewardship of individual prospects with the capacity and interest in an estate or other planned gift(s). The Director will shape and grow a model planned giving program that reflects the size and potential of the capability of the Foundation and its supporters. The Director is an active fundraiser, and in close collaboration with the Vice President, Philanthropy, manages a portfolio of planned giving and major gift prospects. The Director plays an important role in high level strategy and fundraising support to UHF leadership.

The Director of Planned Giving will also fundraise for the Brain Centre Campaign, the University Hospital Foundation's current fundraising focus. The Brain Centre Campaign has raised over \$45 million to date, taking brain care at the University of Alberta Hospital to a dynamic new level. With the Foundation's recent announcement that Wayne Gretzky has joined the Brain Centre Campaign Team as Honourary Chair, the opportunity and profile of this campaign will continue to expand. The Director of Planned Giving will play a key role on our dedicated team of volunteers and donors in raising funds to develop a Brain Centre of national stature in Edmonton

The ideal candidate will have progressively significant and relevant development experience and a proven track record in successfully managing and marketing planned giving programs. The candidate must have the skills and know-how to build and manage a comprehensive planned giving program while also contributing to overall major gift efforts; technical expertise and knowledge of planned giving vehicles, tax law and estate planning; aptitude to think strategically and focus on the organization's vision; a natural ability to cultivate and sustain relationships; a track record in securing major and planned gifts; and a style that shows a passion for the cause and also one that is professional, down-to-earth, enthusiastic, credible and confident.

## KEY ACCOUNTABILITIES

The position will include the following responsibilities:

### Planned Giving:

- Develop strategies to solicit a strong planned giving portfolio;
- Build and increase support for the University Hospital Foundation through active participation in identifying, cultivating and stewarding relationships and connections that lead to major and transformational gifts;
- Create and implement efficient process and systems; and
- Connect and understand the interests of prospects and donors and creatively communicate the objectives of the Foundation both face-to-face and in writing.

### Relationship Building:

- Interpret the concerns and interests of potential donors or stakeholders and translate them into attractive opportunities for investment in the UHF;
- Communicate the Foundation's objectives in a persuasive and stimulating manner with all stakeholders;
- Cultivate and maintain strategic partnerships for the Foundation; and
- Build strong relationships with donors to be able to effectively communicate donors' needs and interest back to the Foundation.

### Leadership:

- Provide leadership within the fundraising team;
- Collaborate with senior staff, volunteers and demonstrate ability to work at all levels within a research-intensive hospital environment;
- Ability to guide team to meet strict deadlines with a sense of urgency;
- Demonstrate the ability to exercise discretion and good judgment in representing the Foundation; and
- Fosters an environment of commitment to confidentiality and professionalism.

## FIRST YEAR DELIVERABLES / MEASURES OF SUCCESS

### Success in the first year will be determined by the candidate's ability to:

- Establish himself/ herself as key fundraiser within the Foundation;
- Build a portfolio of 100 prospects, and increase confirmed bequests;
- Develop new and deepen existing relationships with prospects;
- Strategically attend Foundation and community events to advance Foundation goals; and
- Demonstrate enthusiasm in learnings about the University of Alberta Hospital site and understanding the Foundation's fundraising priorities, in order to effectively connect donors with fundraising interests.

## CANDIDATE PROFILE

### The successful candidate will have the following:

#### EDUCATION:

- Bachelor's degree; and
- Certified Fund Raising Executive (CFRE) designation.

#### EXPERIENCE:

- Minimum 10 years' successful experience in development with at least 5 years' experience in planned giving;
- Demonstrated track record of planned giving fundraising;
- Knowledge of the University of Alberta Hospital considered an asset;
- Knowledgeable in best practices and performance metrics related to fundraising and prospect research; and
- Proficiency with CRM systems, specifically, Blackbaud's Raiser's Edge.

#### COMPETENCIES & ATTRIBUTES:

- Demonstrates philanthropic spirit;
- Outgoing individual with excellent interpersonal skills and the ability to build deep, meaningful relationships and work effectively with donors, stakeholders and community partners;
- A high degree of comfort in identifying, contacting and developing new major gift prospects as well as superior interpersonal skills in stewarding existing donors;
- An outgoing, positive, group win approach with a willingness to learn, teach and share – bringing new skills and developing one's own skills;
- Ability to thrive in both an independent and team environment;
- Excellent persuasive and optimistic verbal and written communication skills;
- Possesses strong organization, administrative and managerial skills with accurate and thorough attention to detail;
- Ability to manage multiple competing priorities to thrive in a fast-paced environment; and
- Confident, mature, self-motivated individual who is engaged in the Foundations goals.

## THE COMPENSATION

A competitive and comprehensive package that incentivizes over achievements awaits the successful candidate.

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