

KGH FOUNDATION



ARE YOU READY TO USE YOUR SUPERPOWERS FOR GOOD?

At the KGH Foundation, we are driven by excellence. We strive to use our superpowers to build world-class health care, right here at home. This work is your opportunity to impact countless lives of those in the Southern Interior. If you're an extraordinary individual who is ready to use their superpowers for a purpose, look no further.



WE'RE LOOKING FOR AN EXCEPTIONAL: DIRECTOR OF PHILANTHROPY, PLANNED GIVING

DATE POSTED: March 3, 2025

POSTING CLOSES: March 31, 2025

POSITION STATUS: Permanent Full -Time

LOCATION: Kelowna , BC

REPORTS TO: Vice President of Philanthropy

SCHEDULE: Monday to Friday (37.5 hours per week)

SALARY BAND: \$80,000-\$100,000, with ability to progress up to \$120,000

SUMMARY:

The Director of Planned Giving is a member of the Philanthropy team and is responsible for developing and managing the Planned Giving program. This role is integral to driving net revenue growth in all aspects of fundraising for the KGH Foundation: Planned Giving, Major Gifts, deferred gifts including bequests, and the Endowment portfolio. This role supports prospects and donors to maximize their gifts via a broad range of planned giving instruments and by developing new opportunities for revenue generation.

The Director of Planned Giving will grow the program by building and maintaining strong relationships with identified prospects and donors, performing research, leveraging the database to identify new potential partners, and by acting as a resource and mentor for the Philanthropy team. Working closely with the entire Foundation team, the Director of Planned Giving increases the Foundation's emerging partner pipeline with professional cultivation, stewardship and solicitation practices. This position is a critical link between the Foundation and its allied industry partners within the community.

KEY RESPONSIBILITIES:

Relationship Management

- Manage a portfolio of 120+ major and planned giving donors and prospects with capacity to give \$10,000+ gifts to support health care in our community.
- Engage and steward planned gift donors through personalized correspondence.
- Build meaningful relationships through all aspects of the giving cycle including identifying, cultivating, soliciting and stewarding new and existing supporters.
- Provide on-going, effective donor engagement through personalized reporting, donor meetings and the creation of innovative stewardship strategies.
- Arrange and conduct face-to-face meetings with partners and potential partners making full and effective use of the expertise and experience of Foundation staff, volunteers, and health care professionals.
- Share philanthropic planning opportunities with supporters to secure planned giving commitments.
- Identify new prospects and cultivation strategies through research, referrals, and community engagement.
- Maintain a high level of professionalism with all donors, adhering to ethical standards and treating relationships with sensitivity, respect, and care.

Planned Giving Program Management

- Together with VP, Philanthropy, develop program budget, objectives and metrics.
- Maintain and grow a successful planned giving program with support from the Development team.
- Gather and use advice and information provided by allied professionals and industry leaders on gifting instruments and trends including bequests, annuities, trusts, life insurance, stocks/shares, etc. to benefit donors, the program, and Foundation team.
- Promote and support active and broad participation by staff and volunteers in raising planned gifts.
- Work with Communications team to oversee planned giving marketing strategies including newsletters, website, surveys, and advertising and communications materials.
- Work with Finance team to oversee estate administration and complex giving vehicles.

KEY RESPONSIBILITIES CONTINUED:

Campaign Fundraising

- Develop and implement customized solicitation strategies for current fundraising campaigns in order to achieve fundraising targets and timelines.

Event Support

- Attend and assist with Foundation donor cultivation, engagement, fundraising, and stewardship events. Provide timely follow-up as required.

Professional Advisor Engagement

- Help plan and oversee educational events for donors and professional advisors.
- Act as a principal liaison to the professional advisors network and community.
- Manage and develop list of professional advisor contacts in our database.

Planning and Leadership

- Work collaboratively with our Development team to set goals, build strategies, and develop tactics to engage our community in health care philanthropy, grow revenue, and increase impact.
- Engage with hospital and health care staff to develop a deeper understanding of priority needs and to communicate the impact of philanthropy with donors.
- Work with our Board and Cabinet volunteers to build and execute strategies to engage new prospects.
- Maintain an in-depth knowledge of the Foundation's programs and priorities and its administrative and financial processes to inspire respect and confidence in donors and prospects.
- Seek out philanthropic trends and industry best practices to inspire giving.
- Seek leadership roles and play an active role in representing KGHF in the community.

Data and Records Management

- Maintain up-to-date donor and action information in the Foundation's database.
- Review communications lists to ensure strategic delivery of publications and communication touchpoints to your portfolio and segments.

CORE COMPETENCIES:

- Relationship building
- Public speaking skills
- Professional communication
- Team work and collaboration
- Time management
- Adaptability/flexibility
- Creative and innovative thinking
- Critical thinking and problem solving
- High caliber writing and research skills
- Planning and organizational skills
- Results focused
- Accountability and dependability
- Ethics and integrity
- Interest in development and continual learning

REQUIREMENTS:

- 5+ years of experience in fund development with a strong focus on Planned Giving and/or a strong technical understanding of the Canadian Planned Gift environment including giving instruments, legislative and tax guidelines, and emerging issues and opportunities
- Proven track record of growth as a leader of a non-profit Planned Giving program
- Proven high-end donor relationship management skills
- Strong business analysis and planning skills
- Excellent written and spoken communications
- Ability to inspire, collaborate and motivate others
- Exceptional organizational skills as required to balance multiple priorities
- Post-secondary education in a relevant field
- Familiarity with RE/NXT database
- CAGP membership and/or CFRE designation considered assets
- Driven by purpose and passionate about health care and community impact

WORKING CONDITIONS:

- Mix of regular office hours and weekend and evening hours as required
- Some minor travel required by vehicle with mileage allowance provided
- Ability to attend and conduct presentations
- Manual dexterity required to use desktop computer and peripherals
- Overtime as required

WHAT'S IN IT FOR YOU?

We're asking a lot of you - so what are we giving back?

- Competitive salary & a transparent salary band
- Pension supplement
- Four weeks paid vacation
- Comprehensive dental and extended medical benefits
- The opportunity for hybrid work after a probationary period
- Opportunities for professional development
- Casual 'Dress for Your Day' dress code
- An incredibly supportive & talented team to work alongside

ABOUT US:

The KGH Foundation is a leading charitable organization dedicated to enhancing health care quality in our region and beyond. Located in the vibrant Okanagan Valley, we offer a dynamic and supportive work environment that encourages collaboration and creativity.

The KGH Foundation's philanthropy team works with purpose and thoughtfulness to connect generosity with meaningful outcomes. Using a community-centered approach, we link donor intentions with opportunities to make needed changes in caring for the health and well-being of people in the Southern Interior of BC.

We value collaboration and ensure supporters and beneficiaries are informed and connected to impact by effectively engaging internal and external partners.

Opportunities to support the KGH Foundation are shared in open dialogue so donors can explore and plan their giving journey. As trusted resources, we offer insights into philanthropic strategies and goals to help amplify the impact of their generosity.

Our success is measured collectively, as a team, reflecting our shared commitment to advancing health care excellence. We are grateful for every opportunity to engage new supporters, to showcase the incredible work of our health care providers, and to inspire deeper connections to our mission in all ways.

Together, we are enabling world-class health care where it matters most – right here at home.

OUR VISION:

World Class Health Care close to Home.

OUR CULTURE CODE:

At the KGH Foundation, we're driven by a sense of purpose and a commitment to making a meaningful impact. We value patience, kindness, and respect, understanding that great things take time and collaboration. Creativity fuels our innovation, while professionalism and compassion guide our interactions. We believe in having fun and sharing stories, cultivating a transparent and team-oriented environment where celebrations and gratitude are part of our daily culture.

To apply, please send your resume and cover letter to Chandel Schmidt, VP of Philanthropy.

The KGH Foundation is an equal opportunity employer committed to cultivating a diverse and inclusive workplace. We warmly invite candidates of all genders, ethnicities, cultural backgrounds, sexual orientations, and abilities to apply. We believe in providing an environment where all individuals have the opportunity to achieve their fullest potential and embrace diversity and the unique contributions that each team member brings to our collective mission. Join us in transforming health care in the southern interior of British Columbia.

If you require accommodation for any part of the recruitment process, please contact us at info@kghfoundation.com.