

Queensway Carleton Hospital Foundation Job Description

Position: Planned Giving Officer

Reporting To: Philanthropy Vice President

Start Date: April 14, 2025

Compensation - \$34.18/hr to \$42.73/hr with the option to enrol into group benefits plan

Status: Part-Time Employment (22.5 Hours/Week)-Potential Full-Time/Permanent Role in April 2026

About QCH Foundation:

Queensway Carleton Hospital is committed to providing a healthy, safe, and inclusive work environment for everyone. Together, with the incredible support from our community, we are enabling excellence in patient care and innovation in healthcare at Queensway Carleton Hospital.

QCH Foundation is seeking an experienced, effective and innovative Planned Giving Officer who will be responsible for increasing planned giving revenue for Queensway Carleton Hospital by identifying, cultivating, and soliciting potential donors to secure bequests, gifts of life insurance, registered funds, securities and other planned gifts. Reporting to the VP of Philanthropy, the successful candidate will start as a part-time employee, sharing responsibilities for the Planned Giving Program with the VP of Philanthropy.

As QCH Foundation launches the most ambitious capital campaign it has ever undertaken, the Planned Giving Officer will be a key member of the fundraising team, working collaboratively with other members of the organization to build strategies for engaging and encouraging donors to give at higher levels.

Roles and Responsibilities

- Program Development and Implementation:
 - Collaborate with other members of the team to develop and execute a comprehensive strategy to identify and engage new planned giving donors, prospects and professional advisors.
 - Assists in the planning and preparation of marketing materials, outreach campaigns, planned giving articles, stories, ads for print and electronic communications, on the QCH website and through the Will Power program.
- Prospect identification and Research:
 - Using information in the Raiser's Edge database and from other sources, research and identify potential donors who might be interested in making planned gifts to QCH Foundation.
- Relationship Building and Cultivation:
 - Develop meaningful relationships with prospective donors through personalized communication, meetings, and events to understand their philanthropic goals and interests.
 - Manage relationships with individuals who have already included Queensway Carleton Hospital Foundation in their estate plans, to maintain or increase their support.
- Solicitation and Gift Closure:
 - Present planned or blended gift options to prospects, addressing their specific needs and concerns, and securing commitments that maximize their current and future support for QCH

Foundation. Growing the planned giving program by promoting planned giving opportunities is one of the goals of the capital campaign.

- Draft gift agreements for endowed or restricted gifts, in consultation with the VP Philanthropy and other staff and advisors.
- Ensure that all Planned Giving Program initiatives comply with national and provincial regulations including, but not limited to PIPEDA, PHIPPA, CRA, Imagine Canada's Ethical Fundraising and Financial Accountability Code and AFP's Code of Ethical Principles and Standards.
- Stewardship and Donor Engagement:
 - Maintain ongoing communication with planned giving donors, providing updates on how their gifts are being used.
 - Ensure legacy gifts are celebrated and recognized on the donor wall, on signage around the hospital when appropriate, or in print and electronic communications.
- Estate Administration:
 - Liaise with estate executors and legal and financial advisors to support the prompt and professional administration of planned gifts where QCH is the beneficiary.
- Educational Outreach:
 - Help educate potential donors about the tax benefits of various planned giving options, such as wills, life insurance, securities, registered funds and other planned gifts.
 - Ensure that all language is inclusive and reflective of the community that is served by Queensway Carleton Hospital.
 - Proactively keep up with industry trends and best practices in planned giving to appropriately identify new and innovative opportunities to enhance and grow the program
- Collaboration with Legal and Financial Professionals:
 - Engage with professional advisors for support in resolving complex or contested estate files as necessary.
 - Build and maintain strong relationships with legal and financial advisors to increase interest in planned gifts for QCH Foundation.
- Reporting and Analysis:
 - Track planned giving results, analyze donor data, and provide reports to leadership on the effectiveness of the planned giving program.

Other duties as assigned in order to meet the overall goals and objectives of the Queensway Carleton Hospital Foundation.

Skills and Qualifications:

- 2-4+ years of progressively responsible fundraising experience including direct solicitations
- Proven ability to build relationships with prospective legacy donors
- Excellent communication and interpersonal skills
- CAGP Gift Planning Fundamentals Course or CAGP Original Canadian Gift Planning Course an asset
- Experience with Will Power an asset
- Proficient in Microsoft Office Suite (including PowerPoint, Excel and Word).
- Knowledge of the federal and provincial estate, trust and tax laws that impact planned giving
- Proficient with Raiser's Edge to maintain records of donor interactions and moves management, and manage and track estate administration
- Committed to ethical fundraising practices and guidelines

- High level of attention to detail and accuracy
- Dependable, flexible, and resourceful with excellent team and interpersonal skills
- Valid Driver's License and access to a vehicle

Personal Attributes:

- Work as a team player promoting a positive and professional work environment and conduct role with integrity and respect.
- Act as an Ambassador throughout the community, positively representing the Foundation.
- Abide by the policies and procedures of the Foundation and the Hospital.
- Operates within culture and core values of the organization.

Work Environment

Based out of a typical office environment with the opportunity to work from home from occasionally. This position is part-time and may be required to work evenings and weekends from time to time.

QCH Foundation is an equal opportunity employer committed to providing purposeful work in a donor-centred environment. All qualified applicants will receive consideration for employment in a framework of respect, inclusivity and diversity.

How to Apply:

Please forward your resume and cover letter in confidence to gchfound@qch.on.ca by Friday, February 28, 2025. Qualified applicants are encouraged to apply as soon as possible and be available for interviews, which will be scheduled as applications are received. While QCH Foundation thanks all applicants for their interest, only those applicants selected for an interview will be contacted.