

Position Announcement

Senior Director, Planned and Major Gifts

Memorial Hermann Foundation

Houston, Texas

Reports To

Associate Vice President, Major Gifts

Organization Profile

Located within the largest medical complex in the world, Memorial Hermann is charting a better future. A future that's built upon the health of the community. This is the driving force for Memorial Hermann, redefining health care for the individuals and many diverse populations served. With 6,700 affiliated physicians and 27,000 employees practicing the highest standards of safe, evidence-based, quality care to provide a personalized and outcome-oriented experience across more than 300 care delivery sites.



As one of the largest not-for-profit health systems in Southeast Texas, Memorial Hermann has an award-winning and nationally acclaimed Accountable Care Organization, 17 hospitals and

numerous specialty programs and services conveniently located throughout the Greater Houston area.

Memorial Hermann-Texas Medical Center is one of the nation's busiest Level I trauma centers and serves as the primary teaching hospital for McGovern Medical School at UTHealth. For more than 112 years, the focus has been on the community, contributing more than \$588 million annually through school-based health centers and other community benefit programs. Now and for generations to come, the health of the greater Houston community will be at the center of what Memorial Hermann does – charting a better future for all.

Memorial Hermann Foundation

The Memorial Hermann Foundation is a not-for-profit organization that exists to advance the mission of Memorial Hermann by promoting its programs, facilities, physicians, research and projects in the community. Through the Foundation, individuals, corporations and foundations can show their support for Memorial Hermann's commitment to quality healthcare in the communities it serves. In 2019, the Board of Memorial Hermann Foundation set forth a new strategic plan to guide the Foundation in exponentially growing philanthropy support for one of the largest, highest quality health care systems in the region.

The foundation is led by the Executive Vice President and CEO, Anne Neeson, a Houston native and graduate of Texas A&M. Ms. Neeson has been recognized as one of the city's 50 most influential women by Houston Women's Magazine, selected as a Woman on the Move by Texas Executive Women and is a fellow in the American Leadership Forum Class XXXVII. Anne's 30-year career with the United Way of Greater Houston coupled with her knowledge of the community and history of raising more than \$1.5 billion provide the exceptional leadership needed to accomplish the ambitious goals set forth in the Foundation's strategic plan.



**Position
Summary**

The Senior Director, Planned and Major Gifts will play a pivotal role in furthering the mission of the Memorial Hermann Foundation by developing relationships that ensure sustainable and long-term philanthropic support through planned and major gifts. Planned giving is a significant area of opportunity in the Foundation's strategic plan.

With an emphasis on planned giving, the Senior Director will manage a significant portfolio of high-capacity donors and donor prospects and will be responsible for planning, directing and soliciting both planned and major gifts to support Memorial Hermann's funding priorities. As the Foundation's primary gift officer for planned giving, the Senior Director will have management responsibilities to create, coordinate and execute a deferred giving program recognized as thorough, accessible and donor centric.

As the Major Gifts enterprise grows, the Senior Director will supervise a team of major gift officers and will assist in the necessary planned giving proposals created by gift officers across the organization. The Senior Director will have expertise in all of the common planned giving vehicles including bequests, trusts, pooled income funds, deferred gifts and annuities and will be the source of education for the Foundation's development staff on matters related to planned giving. The Senior Director will work closely with the Foundation's team to ensure that all members are well prepared to identify donor traits that make deferred gifts a viable option.

In coordination with the Associate Vice President, the Senior Director will have independence in decision-making in the areas of assigned responsibility. The Senior Director will establish marketing strategies targeted to donors and prospects and develop measurable goals for planned giving. The Senior Director will be responsible for identifying, cultivating, and soliciting planned and major gifts from all constituencies.

**Duties and
Responsibilities**

- Work with the foundation's CEO and AVP to establish measurable, achievable, and aspirational goals to deliver results in all assigned areas.
- Devise and implement strategies for specialized campaign plans including capital campaigns and directed fundraising projects.
- Develop and lead planned gift program strategies for the Foundation.
- Conduct periodic team trainings to educate Foundation staff on planned giving tools and changes related to new laws and policies.
- Stay abreast of planned giving laws, trends and best-practices.
- Qualify and manage a major gifts portfolio of high-capacity, high-profile donors. Identifies, cultivates and solicits primarily gifts of \$100,000 or greater from individuals, foundations, and corporations.
- Cultivate and steward complex gifts.
- Coordinate Charitable Gift Annuity program with involved departments across the Memorial Hermann System.
- Participate in and support the fundraising initiatives of the Foundation, including special events, the employee campaign and donor engagement activities.
- Select, mentor, train, supervise, evaluate, and counsel employees as appropriate.
- Collaborate across the Foundation's team on cultivation, solicitation, stewardship and gift officer portfolios. Work closely with the advancement services team on necessary data, gift processing and acknowledgement.
- Promote individual professional growth and development by meeting requirements for mandatory/continuing education.
- Support foundation-based goals that contribute to the success of the Foundation and Memorial Hermann.
- Manages other duties as assigned.

**Knowledge,
Experience and
Skills**

- 10+ years of professional experience.
- Minimum of five years of progressively increasing responsibility in major gift fundraising.
- 5+ years professional experience in planned giving with extensive, hands-on knowledge of planned giving tools, successful strategies, gifts of property, gifts of stock and estate administration.
- Excellent verbal, written and interpersonal communication skills to interact with senior management, board members and other high level volunteers, donors, physicians and prospects.
- Demonstrated ability in thinking strategically to acquire, engage, upgrade, and steward donors.
- Evidence of effectiveness in building and sustaining relationships with donors, staff, partners and physicians.
- Proven ability to lead, motivate and develop staff.
- Goal oriented with strong planning, project management and problem-solving skills and the ability to execute on multiple projects.
- Ability to persuade and motivate others.
- Ability to work well with a variety of stakeholders and to adapt to meet varying needs and conditions.
- High degree of professionalism, collegiality, maturity and diplomacy required.
- Proficient in Microsoft Office products.

Preferred

Preference will be given to candidates that also display one or more of the following:

- An advanced academic degree, non-profit management or development program. Bachelor's Degree required.
- Fundraising certification (CFRE, FAHP or equivalent professional designation).
- Fundraising experience in a health care environment.
- Knowledge of Raiser's Edge.
- Management experience.

Memorandum

The salary and benefits are competitive and commensurate with experience, qualifications, and verifiable salary history. Paschal•Murray supports the commitment of our client in encouraging applicants from diverse backgrounds and cultures. As a condition of employment, our client reserves the right to conduct background verification including academic, work, driving, credit, and criminal histories. This position announcement is not intended to be an exhaustive list of all responsibilities and requirements. It is presented as a fair reflection of the principal job elements.

Nominations and applications are welcome. Please send résumé and letter of application as separate documents attached to an e-mail message to:

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