

Position Announcement

Director of Gift Planning

Rady Children's Hospital Foundation
San Diego, California



Reports To

Associate Vice President, Advancement and Gift Planning

**Organization
Profile**

Rady Children's Hospital-San Diego (RCHSD) has been meeting the health needs of children and families in Southern California since 1954. Today, Rady Children's is a nationally recognized non-profit, pediatric-care facility dedicated to excellence in care, education, research and advocacy. In recognition of their strength and quality of patient care, Rady Children's has received Magnet® designation for nursing excellence from the American Nurses Credentialing Center (ANCC).

Rady Children's is the only hospital in the San Diego area dedicated exclusively to pediatric healthcare and the region's only designated pediatric Trauma Center. Rady Children's is one of the largest pediatric hospitals in the country, and a significant provider of care for children throughout the region. Rady Children's recently achieved its best-ever rankings; U.S. News & World Report ranked Rady Children's among the best children's hospitals in the nation.



in all ten pediatric specialties surveyed; rankings included: Pediatric Cardiology & Heart Surgery #3; Orthopedics #6; Neonatology #7; Neurology & Neurosurgery #8; and Diabetes & Endocrine Disorders #8. In partnership with the University of California, San Diego School of Medicine, Rady Children's is the region's teaching hospital for the next generation of pediatric clinicians and continues to be a major pediatric clinical research center.

Position Summary

The Director of Gift Planning is responsible for identifying/developing relationships with prospects and donors who have the capacity to make a planned or deferred gift; managing an active portfolio of 80-100 prospects with capacity for planned gifts of 250K+ or/as defined by management; and maintaining an active awareness of individuals in the prospect pool in various stages of identification, cultivation, solicitation and stewardship.

This position is considered a frontline fundraiser responsible for soliciting/managing planned gifts including but not limited to bequests, annuities, trusts, deferred gifts, etc. Conducts and holds educational seminars/presentations with legal, financial and insurance professionals, as well as volunteers and current and prospective donors, to offer continuing education. This individual serves as liaison to physicians, hospital administrators, the Estates & Trusts Council, and other stakeholders. This position will execute a comprehensive planned giving program that is aligned with priorities identified by the SVP/Executive Director of the Foundation and the Board of Trustees of Rady Children's Hospital Foundation. Works closely with estate attorneys and other professional services for planned gifts that comply with government regulations and federal/state tax reporting. Maintains an active awareness of goals, objectives, and direction of the development program as a whole. Meets or exceeds individual and department performance standards

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as assigned by management. Creates and executes special projects as assigned by the SVP/Executive Director and/or supervisor.

Specific Responsibilities

Portfolio Management

Maintains a robust portfolio of local and national prospects and donors capable of contributing planned and deferred gifts as defined by management. Portfolio includes planned gift prospects and donors in various stages of identification, cultivation, solicitation and stewardship. Works closely with supervisor and prospect research to move donors through the various cycles of giving.

Solicitation and Strategic Planning

Develops giving opportunities and communication strategies with prospective/existing donors. Able to develop strategies and timetables for successful solicitations that may include but are not limited to bequests, annuities, trusts, deferred pledges, etc. Arranges opportunities for hospital leaders and other administrators, as appropriate, to meet with prospects, donors and volunteers in forums designed to increase interest and support of planned giving. Becomes thoroughly familiar with hospital priorities in order to develop accurate and compelling case statements and gift opportunities with prospective donors. Achieves/exceeds annual metrics as assigned by management.

Philanthropic Advocate

Advances a culture of philanthropy, collaboration, ethics and accountability with internal and external audiences to develop, enhance and sustain maximum fundraising effectiveness. Advocates for RCHSD in a variety of public and private functions regarding the need for and use of philanthropy and planned giving to achieve organizational goals. Conducts and holds educational seminars/presentations with legal, financial and insurance professionals, as well as volunteers and current and prospective donors, to offer continuing education. Establishes close working relationships with departmental heads and hospital staff. Assists trustee and leadership



volunteers in their endeavors to obtain philanthropic gifts for the hospital.

Donor Relations

Coordinates stewardship initiatives to ensure regular contact with donors through personal visits, letters, emails and other written materials, phone calls and events. Assists supervisor with the Estates & Trusts Council to identify opportunities to promote and increase planned giving and develop and execute strategies to support these efforts. Under the supervisor's direction, promotes the Legacy Leaders program. Provides vehicles for continued awareness on the part of donors of current opportunities and goals that encourage planned giving. Works closely with estate attorneys and other professional services for planned gifts that comply with government regulations and federal/state tax reporting. Provides excellent customer service to donors, colleagues, clinical partners, volunteers and hospital leadership.

Data Integrity and Confidentiality

Ensures integrity and functionality of constituent management system through accurate entry and maintenance of constituent and gift data; maintains adequate security and confidentiality of data. Documents and tracks constituent activity and interactions in a timely manner; identifies, collects and analyzes appropriate data for critical decision-making.

Verbal and Written Skills

Demonstrates strong verbal communication skills; articulates the mission and fundraising goals of RCHSD; and makes persuasive oral presentations. Possesses effective communication skills necessary to write and edit letters, memos, reports, discussion documents, proposals and other cultivation, solicitation and stewardship materials. Works closely with estate and financial planners, and able to articulate complex issues around wills/bequests, annuities, trusts, deferred pledges, etc. Works closely with supervisor to manage complex issues which arise from the elaborate interrelationships among hospital administration, departments, and/or Foundation staff.

Special Projects and Assignments

Creates and executes special projects as assigned by the SVP/Executive Director and/or supervisor. Works evenings and weekends as needed.

Qualifications

Qualities and experiences that ideal candidates should display include:

- An earned baccalaureate degree.
- Three years of professional experience.
- Driver's license and proof of auto insurance.
- Development experience.
- Experience with executing a comprehensive planned gift program, including solicitation.
- Detail-oriented.
- Team player with the ability to work independently as well as collaboratively to achieve common goals.
- Works efficiently under pressure; meets deadlines; demonstrates strategic thinking and good decision-making, as well as an entrepreneurial spirit.
- Articulate, poised, and possesses strong writing skills.
- Ability to work evenings and weekends as needed.

Preferred

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

- Five years of professional experience.
- Experience with Blackbaud non-profit applications.
- Advanced academic degree in a related field.
- Professional and quantifiable fundraising experience with a children's hospital.
- Professional certification (CFRE, FAHP or equivalent).
- Fundraising experience in a healthcare environment.
- Demonstrated history of increased responsibility and progression in the fundraising profession.

Memorandum

The salary and benefits are competitive and commensurate with experience and qualifications. 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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