



POSITION SPECIFICATION

SENIOR DIRECTOR OF GIFT PLANNING

Oregon Health & Science University Foundation

Portland, OR

Leadership Search Partners

is a search firm focused exclusively on the nonprofit sector. a division of Brakeley Briscoe, Inc. (BBI), the San Francisco Bay Area-based firm works with local, national, and international nonprofits to help them hire exceptional senior-level leaders.

Managing Director Scott Staub

is leading this search assignment. Inquiries may be made, in confidence, to Scott Staub at scott@leadershipsearch.com.



TITLE: Senior Director of Gift Planning

ORGANIZATION: Oregon Health & Science University Foundation

LOCATION: Portland, OR

REPORTS TO: Vice-President of Development

MISSION

As part of its multifaceted public mission, Oregon Health and Science University (OHSU) strives for excellence in education, research and scholarship, clinical practice and community service. Through its dynamic interdisciplinary environment, OHSU stimulates the spirit of inquiry, initiative and cooperation among students, faculty and staff.

OHSU is Oregon's only academic health center, and one of the only universities in the U.S. devoted exclusively to educating doctors, dentists, nurses, pharmacists and public health professionals. We not only treat the most complex health needs in the region, we make discoveries that save lives and train leaders to address the societal issues that impede health.

OHSU Hospital and Doernbecher Children's Hospital are consistently ranked as top hospitals in Oregon and among the nation's best in multiple specialties.

OHSU brings in more than \$400 million a year in competitive research awards and was named among the top 20 research institutions in the world by the publication Nature in 2017.

OHSU helps educate more than 4,000 students a year and is a national leader in education innovation. Its new, more personalized and interactive medical school curriculum allows students to customize their journey, start clinical exposure earlier and potentially graduate sooner.

ABOUT THE ORGANIZATION

The OHSU Foundation exists to secure private philanthropic support to advance OHSU's vital missions. The foundation is also responsible for investing and managing gifts and ensuring that donor wishes are honored. The OHSU Foundation is one of the largest public university foundations in the Northwest, and strives to foster a workplace in which transparency, respect, diversity & inclusion and collaboration are rewarded.



ABOUT THE OPPORTUNITY

OHSU has a tradition of taking on the impossible and delivering. OHSU created the world's first successful artificial heart valve. OHSU also developed the first targeted cancer therapy and launched the field of personalized medicine.

Under the leadership of the new Foundation President, Matt McNair, the Senior Director of Gift Planning will help complete the ONWARD campaign, which seeks to raise \$2 billion for many key OHSU initiatives by the end of 2020. The campaign was jump-started by the historic Knight Cancer Challenge, which raised \$1 billion in less than two years to fund new innovations in cancer prevention, detection and treatment. In addition to this campaign, the Director will spearhead fundraising to support OHSU's exciting initiatives. Working with the Senior Director of Gift Planning are two accomplished gift planning professionals with over 50 years of experience between them. The Senior Director of Gift Planning will work closely with other Foundation staff and volunteer leaders to set new levels of support for the Foundation through planned gifts.

Responsibilities

- **Leadership**
 - Provide leadership and management to the gift planning team as well as mentoring to development staff on gift planning; provide guidance on best practices and strategy
 - Partner with leaders across the organization to deliver effective strategies for donors
 - Partner with colleagues to ensure that every donor has an optimal level of interaction with volunteers, leadership and program staff

- **Fundraising**
 - Develop, refine and implement strategies for fundraising that maximize potential giving via gift planning
 - Direct the work of the gift planning team to develop opportunities that maximize giving
 - Manage an active portfolio of major/planned gift donors and prospects by creating and implementing personalized cultivation and stewardship plans and gift requests for each donor within the portfolio; assign other donors as appropriate



- Analyze reports on donor interactions to make strategic decisions for the program to maximize giving opportunities; prepare and present information and progress to the Foundation's senior management team and other stakeholders

Professional Experience/Qualifications

Experience:

- Ten or more years of substantial and progressively responsible professional experience, including 4+ years of experience supervising professional staff
- Demonstrated experience overseeing complex or multiple projects through to success, including meeting financial goals and coordinating the work of key staff and partners
- Demonstrated success in fundraising and experience with major donors, with a track record of soliciting and closing six- and seven-figure gifts; experience in eight-figure gifts a plus
- Experience in working in a complex, matrixed organization; experience in academic healthcare a plus.
- Proven knowledge and experience in full spectrum of deferred gift techniques and vehicles, including gift annuities, charitable remainder trusts, pooled income funds, life estate agreements, charitable estate planning and procedures regarding probate and trust administration
- Familiarity with procedures and documentation related to the transfer of real property and securities

Skills:

- Strong leadership skills, with an entrepreneurial spirit and strong business and management skills
- Demonstrated ability to inspire and motivate staff, volunteers, donors, and potential partners a must
- Strong strategic and implementation skills; ability to grasp the opportunities and challenges of the organization and the role
- Outstanding communicator; excellent speaking, writing and interpersonal skills
- Experience using a development database and high comfort level analyzing data to hone strategies and achieve goals

Personal Characteristics:

- Willingness and ability to travel throughout the region and nationally, as required
- A commitment to outstanding healthcare and research to advance knowledge and treatments to improve healthcare
- Commitment to collaborative engagement with OHSUF staff and OHSU faculty



Education:

- Bachelor's degree required
- Master's or JD preferred

COMPENSATION

A highly competitive compensation and benefits package will be made available to the qualified candidate.

TO APPLY

Leadership Search Partners is conducting this search on an exclusive basis on behalf of Oregon Health & Science University Foundation. Interested candidates should apply via email by sending a letter outlining qualifications, brief bio and resume as PDF or Word documents to Search Coordinator Chelsea Burr at chelsea@leadershipsearch.com, with "OHSUF" in the subject line.

Inquiries may be made, in confidence, to Search Consultant & Managing Director Scott Staub at scott@leadershipsearch.com.

OREGON HEALTH & SCIENCE UNIVERSITY FOUNDATION and Doernbecher Foundation provide equal opportunities to all individuals without regard to age, color, current or future military status, disability (physical or mental), gender, gender identity, genetic information, marital status, national origin, pregnancy, race, religion, sexual orientation, veteran, or any other status protected by law. The OHSU and Doernbecher Foundations, as required by law, are making available [here](#) a copy of Employee Rights and Responsibilities under the Family and Medical Leave Act.

This job description is not a contract of employment and employment is not guaranteed for any particular length of time and the content of this job description can be changed by Oregon Health & Science University Foundation at any time. Employees are responsible for reviewing and performing the key responsibilities in the most current version posted on OHSUF's intranet site as well as other duties as assigned by management. Employees are also responsible for notifying management or human resources of any accommodations he/she needs to perform the duties outlined in this job description.

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