



Director, Gift & Estate Planning Sunnybrook Foundation

THE OPPORTUNITY

Sunnybrook Foundation is seeking a collaborative builder and self-starter to serve as our Director, Gift & Estate Planning with responsibility for the development and execution of an integrated program strategy in partnership with colleagues across the Foundation and Hospital. Reporting to the Executive Director, Philanthropy, the Director will be accountable for the direction of the organization's planned giving efforts resulting in a leading-edge fundraising practice including but not limited to donor communications, events, telemarketing, direct mail, surveys, physician strategy, management of a personal donor portfolio and the team responsible for executing the program activities.

As a senior leader in the organization, this individual will be a contributing architect of the Foundation's expansion over the next decade and lead its teams to set strategic direction and develop annual business plans to realize the Foundation's bold ambitions.

This is an opportunity to build upon a strong foundation while bringing innovation, best practices, consistency, and sustainability to all areas of the program. As the lead and advocate for the program, the Director will work closely with colleagues across the Foundation on approaches and opportunities that build awareness, create excitement, and inspire donor support. The Director will work with the Philanthropy team as a strategist and thinking partner, helping to incorporate and create a presence for planned giving as a part of ongoing donor discussions and cultivations. As well, the Director will collaborate with the Community Giving team and create opportunities for migration between programs.

As someone who subscribes to the 'one team, one goal' philosophy, the new incumbent will lead, direct, execute and achieve their personal and program team goals, balanced with the ability to hold colleagues accountable to deliverables and decisions with diplomacy and strong judgement.

This is an exciting time to join Sunnybrook Foundation as it invests in new resources, strategies, and structures that will enhance Foundation-Hospital collaboration and create opportunities for partnership and innovation in order to invent the future of health care. The Director will join a Foundation that has unparalleled momentum at a world-renowned healthcare centre where life-saving innovation happens when it matters most.

Sunnybrook Foundation works within a hybrid model; at this time staff are expected to be in the office a minimum of 2 days per week. Proof of COVID-19 vaccination is a requirement of all Sunnybrook Foundation staff except for those with an approved medical or human rights exemption.

ABOUT SUNNYBROOK FOUNDATION

Philanthropy plays a critical role in every discovery, innovation, and moment where Sunnybrook provides high-quality care when it matters most.

Sunnybrook Foundation inspires lasting support for Sunnybrook. Together with our donor community, Sunnybrook Foundation raises critical funds for Sunnybrook's world-class academic health sciences centre to achieve our shared vision to invent the future of health care. Sunnybrook Foundation is committed to leading with our values and developing a model of shared leadership that will support our plans for ambitious growth.

Located within Sunnybrook Health Sciences Centre on Bayview Avenue in Toronto, the Foundation consists of more than 80 professionals and support staff who work in close partnership with our Hospital colleagues. With ambitious goals ahead, the Foundation is committed to continuing to grow our results and impact as we help Sunnybrook to raise sights, uncover new possibilities, develop talent, and deliver exceptional care.

Last year, thanks to the commitment of our dedicated volunteers, donors, and staff, we raised more than \$72 million to support Sunnybrook's priorities and we are also fortunate to have an endowment fund of more than \$90 million that helps to support Sunnybrook's mission.

OUR VALUES

KILGOUR LEGACY SOCIETY

The Kilgour Legacy Society was founded to honour and celebrate individuals who have chosen to shape the future of health care by remembering Sunnybrook with a legacy gift.

From the very beginning, Sunnybrook was built on the legacy of those who chose to make a profound difference for future generations. It began with a gift of land from the estate of Joseph Kilgour by his widow Alice. From that gift, Sunnybrook has evolved to become one of Canada's top health sciences centres. When you inform us of your intention to leave a legacy gift to Sunnybrook, you become a part of this group of exceptional donors.

ABOUT SUNNYBROOK HEALTH SCIENCES CENTRE

Sunnybrook is a world-renowned academic health sciences centre with a reputation for providing the highest quality care and for teaching and research excellence. The Hospital's 13,000 staff, students, physicians, and volunteers provide extraordinary care at critical times in the lives of the more than 1.3 million patients we see each year. *Sunnybrook treats more people with their lives on the line than any other hospital in Ontario with over 80 hospitals referring their patients to Sunnybrook every day.*

Sunnybrook leads by discovery, innovation, teaching, and learning. We have evolved to become one of Canada's largest and most dynamic health science centres. First opened in 1948 as

Sunnybrook Veterans Hospital and renamed Sunnybrook Health Sciences Centre in the 1990s, today, Sunnybrook has established itself across three campuses and is home to Canada's largest trauma centre. Sunnybrook is a fully affiliated University of Toronto teaching hospital.

Our vision at Sunnybrook is to *invent the future of health care* with a focus on trauma, cardiac, stroke, high-risk pregnancy and newborns, and cancer. Our Primary Care Programs include:

- [DAN Women & Babies Program](#)
- [Holland Bone & Joint Program](#)
- [Hurvitz Brain Sciences Program](#)
- [Integrated Community Program](#)
- [Odette Cancer Program](#)
- [Precision Diagnostics and Therapeutics](#)
- [Schulich Heart Program](#)
- [St. John's Rehab Program](#)
- [Tory Trauma Program](#)
- [Veterans Program](#)

2021 – 2025 Strategic Plan

Our health care systems in Ontario and across Canada are changing rapidly and as a result, there are significant influences that have shaped our thinking and our goals and objectives within each of our strategic directions. Among these have been the impact of the global pandemic and how this has been a catalyst for change in areas such as accelerating the implementation of our digital care strategies. Our strategic thinking has been cognizant of the significant social justice issues that have been brought to the forefront and we have amplified the important work of addressing equity, diversity, and inclusivity through our Strategic Plan.

Our vision to invent the future of health care remains highly relevant and our passion for innovation is fundamental in our drive to continually improve patient care. As Sunnybrook celebrates its 75th anniversary of caring for our first patient, the hospital continues to live its dual mandate of serving our local community and as a regional centre that provides complex and specialized care when it matters most for Ontarians. Balancing these mandates in times of financial uncertainty remains a challenge and through this plan, the organization is increasingly looking for opportunities to generate new lines of revenue and to ensure efficiencies are realized.

While our 2025 Strategic Plan has been developed during one of the most challenging times in the history of our health care system, the lessons we have learned during this period and the values that define Sunnybrook, have guided our strategy to position us well for a successful future.

ADDITIONAL INFORMATION

- [Sunnybrook Hospital](#)
- [Sunnybrook Foundation](#)
- [Sunnybrook Foundation Planned Giving](#)
- [Sunnybrook Strategic Plan 2021 - 2025](#)

- [Sunnybrook Research Institute](#)
- [Sunnybrook Education](#)
- [Sunnybrook Organization & Medical Structure](#)
- [Sunnybrook Facts & Figures](#)
- [Sunnybrook Magazine Winter 2021](#)
- [2020 Report to Donors](#)
- [Your Impact](#)
- [Foundation News & Media](#)
- [Sunnybrook Foundation Financial Summary 2020/21](#)

KEY DUTIES & RESPONSIBILITIES

Strategy and Planning

- Establish the Gift & Estate Planning program's strategic focus, objectives, and annual goals, including annual business planning and associated budgets. Ensure strategies are integrated and aligned with SBF's vision, purpose, values, and long-term strategic directions
- Work with Hospital stakeholders and Philanthropy Directors to understand programmatic content, strategic priorities and initiatives, and directly contribute to securing philanthropic support
- Act as a key advisor in ensuring proper interpretation and implementation of Foundation and Hospital policies

Gift & Estate Planning Program Management

- Develop and manage a portfolio of planned giving donors and prospects through the donor life cycle
- Serve as a strategic partner to colleagues providing counsel and support on donor strategy. Regularly participate in donor cultivation, solicitation, and stewardship of prospects
- In collaboration with the Philanthropy and Community Giving program areas, develop integrated strategies and approaches that drive planned giving capacity and results through education, training, and coaching
- Work with hospital staff and physicians to identify grateful patients and build a prospective planned giving donor pipeline
- In partnership with the Stewardship team, set the stewardship strategy for the Kilgour Society and accountable for its implementation and execution by the team
- Provide oversight for estate administration ensuring best practice. Provide guidance and direction on complex cases to the coordinator who manages the operations and file processing
- Engage and support senior volunteers and ambassadors, leveraging relationships, advice, and support
- Measure, monitor, and manage the overall performance of the program and direct reports against set performance targets
- Build and maintain relationships with allied professionals

Team Leadership

- Manage the human, financial and operational objectives of the Gift & Estate Planning team including:
 - Philanthropy Officer, Gift & Estate Planning
 - Coordinator, Gift & Estate Planning
- Provide strategic direction to team and interdepartmental colleagues on targeted donor and prospect communications, recognition, and stewardship activities
- Coach and motivate staff and volunteers to achieve program objectives and fundraising goals
- Measure, monitor, and manage the overall performance of the program and direct reports against set performance targets
- Adhere to and ensure compliance with Foundation processes, policies, systems and practices within the Gift & Estate Planning team

QUALIFICATIONS & COMPETENCIES

- Progressive experience and a successful track record in a gift planning, major gift, or fundraising role in settings of significant complexity
- Strong knowledge of gift and estate planning and exposure to and experience with major gift fundraising and donors
- Experience integrating planned giving strategies across multiple revenue channels (i.e. major gifts, community giving, etc.)
- Proven personal success in securing philanthropic contributions from individual donors
- Ability to build and maintain successful relationships with a wide variety of internal and external stakeholders
- Demonstrated commitment to collaborative leadership in a values-driven, mission-driven context
- Demonstrated success in building donor engagement programs, protocols, policies, and processes to support the delivery of meaningful donor experiences
- Experience guiding and motivating staff with the ability to develop and mentor individuals and teams toward fundraising success
- Success in developing relationships, engaging and working with senior volunteers, physicians, and hospital administration (or equivalent) to advance the mission of the organization
- Experience with prospect management best practices, data, and reporting, and a keen understanding of metrics and key performance indicators
- Solid understanding of donor databases, ideally Raiser's Edge
- A strong understanding of donor stewardship and its importance in strengthening and deepening donor relationships
- Ability to work independently with discretion relating to donor negotiations, policy administration and interpretation, and administrative responsibilities
- Excellent oral and written communication skills with the ability to influence, inspire and engage key stakeholders internally and externally
- Demonstrated knowledge of and interest in promoting a culture of diversity, equity, inclusion, and accessibility; previous experience and understanding of working with staff, volunteers, and donors from diverse cultural, socio-economic and ethnic backgrounds

- Strong judgement with experience identifying and anticipating issues
- Work comfortably in a highly collaborative environment; manage competing interests and maintain a positive, flexible and responsive attitude
- Understand and successfully navigate the philanthropic industry, keeping abreast of best practices

FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of Sunnybrook Foundation. For more information about this Foundation leadership opportunity, please contact Ellie Rusonik, Vice President, Search + Talent by email at SunnybrookGE@kcitalent.com.

To view the full Executive Brief, please visit: www.kcitalent.com.

All inquiries and applications will be held in strict confidence. Interested candidates should send resume and letter of interest to the email address listed above by **January 20, 2023**.

Sunnybrook Foundation is strongly committed to inclusion and diversity within its community and welcomes all applicants including but not limited to: visible minorities, all religions and ethnicities, persons with disabilities, LGBTQ persons, and all others who may contribute to the further diversification of ideas.

Sunnybrook Foundation is committed to providing accessible employment practices that are in compliance with the Accessibility for Ontarians with Disabilities Act (AODA). If you require accommodation for disability during any stage of the recruitment process, please indicate this in your cover letter.

Please note that the salary range for this position is \$120,000 - \$160,000.