Job Title: President, Foundation/Chief Development Officer
Department: Executive Staff
Date: 5/5/13
Written by:

Summary of Position:

The Chief Development Officer for Summa Health and President of Summa Foundation will provide visionary, strategic and operational leadership for Summa Health Foundation, a not-for-profit foundation serving the mission of Summa Health. This will include creating, planning, coordinating as appropriate, and supporting the execution of successful initiatives in principal gifts, planned giving, grants and annual giving in partnership with hospital executive staff, physicians, and Board members of Summa Health and Summa Health Foundation. The CDO will lead collaborative fundraising initiatives, identify and support system-wide implementation of best practices, and provide centralized development services as needed and appropriate to fulfill the philanthropic potential of Summa Health. This position will foster a vibrant culture of philanthropy and assure strategies, systems, and procedures are implemented to support a highly effective development enterprise.

Dimensions of Position:
Operating Budget:
Revenue:
Expenses:

Minimum Qualifications:

1. Formal Education Required:
   a. Advanced degree preferred.

2. Experience & Training Required:
   a. Ten (10) to fifteen (15) years of comprehensive fundraising management and leadership experience, preferably in large healthcare system.
   b. Experience in successfully soliciting and managing major and principal gifts.
   c. Major campaign experience, including planning and successful implementation.
   d. Experience in building, mentoring, and motivating a team in a complex organization with demonstrated skill in developing strong teams and collaborations.

3. Other Skills, Competencies and Qualifications:
   a. Ability to cultivate relationships across the organization
   b. Strong verbal and written communications skills
   c. Ability to demonstrate an ability to enhance fundraising results
   d. Excellent analytical and organizational skills
Management Job Description

- **Ability and motivation interest to lead a professional team through the planning process and execution of successful fund raising efforts and campaigns**
- **Ability to function independently and facilitate collaborative interaction**
- **Ability to understand the role and use of information systems in development**
- **Must possess in-depth marketing skills related to health care and its causes for philanthropic support**
- **Demonstrated ability to identify current or future board members, orient current and new board members, and engages an independent board of directors to achieve the strategic and tactical goals of the Foundation.**
- **Population Specific Competency: Ability to effectively interact with patients/customers with the understanding of their needs for self-respect and dignity**

4. **Level of Physical Demands:**
   - **Sedentary:** Exerts up to ten pounds of force occasionally and/or a negligible amount of force frequently

**Direct Management Reporting Relationships**
Indicate the title that this position reports to, as well as the various titles reporting directly to this position. Include FTE counts.

**Position Reports to:** President & CEO, Summa Health; Chair, Summa Foundation

**Positions Reporting to this position:** 3 FTE’s: System Directors, Major Gifts

Note: this includes FTEs over which this position has hire, fire and performance review responsibilities.

**Indirect (Matrix) Management Reporting Relationships**
Indicate any position(s) to which this position has an indirect reporting relationship, as well as the position(s) over which this position has indirect management authority. Include FTE counts.

**Positions Indirectly Reporting to this position:** 10 FTE’s: Executive Staff Assistant; Manager, Gift Planning; Sr. System Foundation Analyst; Mgr, Stewardship; Development Officer, Annual Giving; Development Officer (2); Specialist, Donor Relations; Specialist, Donor Communications; Specialist, Prospect Research and Tracking.

**Essential Functions:**
The following key results and accountability areas will be carried out in a manner fully consistent with the Summa mission, values and philosophies.

1. **Financials**
Management Job Description

- Plans, prepares, implements and monitors area’s operational and capital budgets to ensure sound fiscal management consistent with the goals of Summa Health.
- Manages productivity within department; minimum target is 100%; meets targets set in assigned area.

2. Managing & Leading People
- Manages performance and ensures 100% of all required performance appraisals are completed.
- Ensures all staff members complete Mandatory Organizational Education (MOE) training annually.
- Ensures all staff members adhere to established Service Excellence Standards.
- Monitors and manages staffing, turnover and vacancy in assigned departments.
- Ensures continued development and education of self and staff.
- Ensures excellent open communications within the department through regular staff meetings, preparation and distribution of minutes, and other means to keep the department informed on a timely basis.

3. Service Excellence
Identifies the direct and indirect customers served by assigned department, determining appropriate products and/or services based upon customers’ needs, measuring customers satisfaction and developing actions that continually improve services. Ensures staff and self follow Service Excellence Standards of Behavior, including standards for Appearance and Environment, Attitude and Courtesy, Communication, Teamwork, Customer Service, Confidentiality, Safety and Etiquette.

4. Planning & Organizing
Plans and organizes all activities under his/her control in an effective manner. Prepares departmental tactical and strategic plans as well as designing appropriate organizational structures for areas of responsibility. Organizes and delegates work in an effective manner, establishes appropriate periods for completion of work, and provides the necessary leadership to ensure effective work results.

5. Performance Improvement
Ensures that his/her department adopts a Total Quality Improvement approach to its work that includes employee empowerment, managing with data, a philosophy of continual improvement, a customer driven attitude and a work methodology that maximizes error prevention. Develops and maintains a complete quality monitoring system throughout their department.

6. Relationships with Managers, Peers, etc.
Develops and maintains open, honest and mutually beneficial relationships with their manager, fellow managers, staff and the departments to which he/she provides service. Relationships will be maintained in a manner consistent with Summa’s mission, values and philosophies.

7. Support Diversity
Ensures a work environment that promotes and embraces diversity. Works to support and strengthen Summa’s service to the community.

8. Regulatory Compliance
Complies with regulatory and accreditation requirements through completion of Summa’s mandatory organizational education, JCAHO, Code of Conduct and compliance training. Responsible for adherence to applicable regulations in daily activities and work processes.

9. Additional Key Accountability Areas:
The following key results and accountability areas should be specific to this position. There should be major categories of responsibility and measures of accountability and expectations included for each major category. Note these areas of responsibility should not duplicate those previously covered above.

1. Strategic Planning - In conjunction with the President and CEO of Summa Health System and the Chairman of the Foundation Board of Directors, develops and updates strategic plan for the Foundation. The Foundation strategic plan will complement the system strategic plan. Objectives to achieve plan goals will be established annually and be reflected in the business/management plans and the annual budget.

2. Fundraising - Guides an energetic team that will develop plans to create proposal development strategies and implements them across individual, corporate, foundation and public sector resources. Prepares the Foundation for launch and successful execution of a comprehensive fundraising campaign.

3. Operations - Oversees all Foundation administrative functions at the highest level, developing and overseeing an operating budget, directing strategic communications and messaging efforts for the Foundation in alignment with System marketing and communications. Gains consensus on and creates compelling philanthropic cases for system-wide support aligned with institutional vision and goals.

4. Assists the Foundation Board in defining the role of the Foundation members.

Note: The above stated duties are intended to outline those functions typically performed by the incumbent in this position. This description of duties is not intended to be all-inclusive nor to limit the discretionary authority of supervisors to assign additional tasks of a similar nature or level of responsibility.