



POSITION BRIEF

Manager, Gift & Estate Planning

THE MONTREAL
GENERAL
HOSPITAL
FOUNDATION



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FOR MORE INFORMATION

KCI (Ketchum Canada Inc.) has been retained to conduct this search on behalf the Montreal General Hospital Foundation. For more information about this leadership opportunity, please contact Sylvie Battisti, KCI Vice President, Search + Talent by email at MGHF@kcitalent.com or by phone at (438) 820-3496.

All inquiries and applications will be held in strict confidence.

Please send resume and letter of interest to the email address listed above by **February 24, 2020.**



Manager, Gift and Estate Planning The Montreal General Hospital Foundation

THE OPPORTUNITY

The Montreal General Hospital Foundation (MGHF) is seeking an energetic, forward-thinking and experienced leader who will work as part of our team to support an ambitious fundraising agenda within our current fundraising Campaign, Code Life, and beyond.

Reporting to the Vice-President, Development, the Manager, Gift and Estate Planning will provide overall leadership and management for the Foundation's gift planning strategies and activities designed to engage, cultivate, solicit and acknowledge donors of estate and planned gifts.

In addition, in this newly established role, the Manager will ensure estate administration and follow-up, increased marketing, promotion, and facilitation of complex gift and estate planning, expansion and greater activation of the MGH Foundation's advisory professional network and greater internal integration with the Development and Communications team (annual and major gift programs) to put forward dual asks and to accelerate gifts where possible.

ABOUT THE MONTREAL GENERAL HOSPITAL - MUHC

The Montreal General Hospital, part of the McGill University Health Centre network, is home to the only adult Level 1 Trauma Centre in downtown Montreal, and has expertise in Trauma Care (surgery, orthopedics), Cardiology, Lung and Thoracic Cancer, Mental Health as well as other specialities. In addition, an important portion of the Research Institute of the MUHC is housed at the Montreal General Hospital site, including many researchers in the BRAIN program, thoracic cancers, allergy & immunology as well as a newly inaugurated clinical innovation platform.



Founded in 1821, the Montreal General Hospital (MGH) was the first non-denominational public hospital in Montreal and, thanks to continuous support from the community, has developed into one of the leading healthcare institutions in the country.

A pioneer hospital in North America, the MGH introduced teaching at the bedside and founded the first medical school in Canada – the Faculty of Medicine at McGill University. The hospital has remained a teaching hospital for the century and a half of the Faculty's existence. The Montreal General Hospital is dedicated to patient care through diagnosis, treatment, research and teaching.

ABOUT THE MONTREAL GENERAL HOSPITAL FOUNDATION



Established in 1973, the Montreal General Hospital Foundation is a registered charity dedicated to raising and managing funds in support of excellence in patient care, teaching and research at the Montreal General Hospital. These funds are invested in the priority needs of the hospital and its patients, in accordance with the wishes of donors.

Over the last ten years, the Foundation has invested \$150 million in support of patient services and research and during the 2018-2019 period, our 7,000 donors generously contributed \$ 15.9 million to fund our work. On average, total fundraising costs represent just 16% of funds raised, making the MGH Foundation among the most efficient of any foundation in Canada.

CODE LIFE: VITAL SUPPORT FOR VITAL CARE

In November 2018, the Montreal General Hospital Foundation officially launched the CODE LIFE Campaign which aims to raise \$100 million by 2021, the hospital's 200th anniversary, and we are on track to achieving this goal. *Code Life* is our pledge to support vital care for the community at large. This pledge acknowledges the precious nature of life. It is the symbiotic relationship between our donors' desire to make a real difference, and the informed and unbiased selection of priority healthcare projects to support. Through *Code Life*, we seek to protect, heal, extend, and save lives in all the medical institutions with which we are affiliated. We aim to provide our medical teams with an environment that allows them to best provide vital care to our deserving patients and to pursue innovative research projects.

CAMPAIGN CODE LIFE: GOAL \$100 MILLION

\$50 M to create the best environment for our patients and medical teams

- Modernization of the Montreal General Hospital.
- New spaces for the consolidated Mental Health Mission.
- New spaces for Innovation & Research.
- Significant modernization of clinics and patient spaces.

\$50 M to help our doctors innovate in patient care and research

- Trauma Mission – Defying the odds to save lives.
- Surgical Mission – New developments with dramatic patient benefits.
- Mental Health Mission – Offering a continuum of care for better recovery.
- Medical Mission – Collaboration between key specialties.
- Research – Innovation that matters.

To reach the target of \$100 million by 2021, the Foundation is fortunate to count upon the support of an experienced and highly dedicated campaign cabinet co-chaired by André Desmarais, France Chrétien-Desmarais, Andrew Molson and David McAusland, and comprised of Gregory Charles, Caroline Néron, Yvan Cournoyer, François-Xavier Seigneur, Vincenzo Ciampi, Kim Anderson, Jacques Chamberlain, Mark Smith, Gail Jarislowsky, Richard Cherney and Brenda Gewurz.

ADDITIONAL BACKGROUND AND RESOURCES

For more information about the Montreal General Hospital and its Foundation please visit:

- <https://www.mghfoundation.com/en/>
- <https://muhc.ca/mgh/dashboard>

MGHF Board of Directors:

- <https://www.mghfoundation.com/en/about-foundation-codelife/our-board-of-directors/>

MGHF 2018-2019 Annual Report:

- <https://www.mghfoundation.com/en/about-foundation-codelife/annual-reports/>

CODE LIFE

- <https://www.mghfoundation.com/en/about-foundation-codelife/code-life-100-m-goal/>

IDEAL CANDIDATE

The ideal candidate will be an active listener and an experienced relationship manager with strong emotional intelligence and a donor-centered mindset, skilled at effectively interacting with existing and potential donors, their families and advisors. The new incumbent will also be aware of the importance of establishing relationships with Hospital staff, physicians and other healthcare professionals. With a keen sense of tact and diplomacy, and possessing integrity and transparency, the successful candidate will be an approachable, trustworthy and respectful professional who works well with a wide range of individuals.

The successful candidate will quickly grasp the priority funding projects and will have a strong interest in working in a healthcare and research environment. With maturity and confidence, the new incumbent will clearly articulate funding opportunities to potential donors. An authentic and influential communicator, the ideal candidate will be a strong writer who is skilled at making the complexity and impact of a planned gift understandable to prospective donors and is at ease making presentations to a variety of internal and external audiences.

The Manager will be an internal champion for the development of a greater literacy for Foundation staff about planned giving vehicles, opportunities and strategies that can be integrated into other programs. He/she will truly value working collaboratively, sharing ideas and successes as part of a united team. Proactive and dependable, the ideal candidate will take initiative and demonstrate rigour, recognizing that their own goals are a vital part of the team's goals.

Based on the objective of formally establishing a gift and estate planning program in a strategic and forward-thinking way at the MGH Foundation, the new Manager will proactively seek input on objectives and plans while imparting knowledge with others, implementing best practices and smoothing the path forward with resources, processes and tools for success. A highly organized problem solver, the incumbent will possess a combination of passion and drive to remain focused on priorities and results, always demonstrating initiative and a strong work ethic.

The ideal candidate will be open and interested in continued learning and will keep abreast of the latest trends, developments and best practices in philanthropy and donor relations management, through active engagement in related professional associations such as the Canadian Association of Gift Planners.

KEY AREAS OF RESPONSIBILITY

Specific duties for the Manager, Gift & Estate Planning include but are not limited to the following:

- Lead the development and implementation of an overall strategy for gift and estate planning, including revenue targets and expenditures, as well as annual and multi-year goals for estate and planned giving fundraising initiatives that are integrated across Foundation fundraising programs.
- Collaborate effectively with other members of the Development team in particular, to ensure an integrated approach to fundraising that maximizes both current and future contributions from donors and their estates.
- Identify and manage planned giving donor prospects and strategies for cultivating, soliciting and stewarding planned giving donors.
- Lead the solicitation of planned gift prospects. With support from other colleagues, prepare proposals and financial illustrations of proposed gifts.
- Oversee the management of estates in progress (with the support of administrative team) and where necessary liaise with Estate executors, Estate advisors and family members.
- Assist in arranging events, seminars or workshops for prospective donors, professional financial and estate planners and related groups, as well as educational awareness sessions for internal groups.
- Work closely with the Development Officer, Stewardship, by ensuring appropriate impact reporting, recognition and ongoing stewardship for donors.
- Disseminate increased knowledge of planned giving vehicles and opportunities across the Foundation team, volunteers and all revenue channels.
- Ensure the donor management system (Raiser's Edge) is fully utilized to effectively enter, track and retrieve estate and gift planning information.
- Monitor and evolve standard reporting systems for monitoring gift expectancies and realizations.
- Administer and develop processes for the various strategic giving vehicles we accept: estates, life insurance policies, shares, donor advised funds, charitable remainder trusts.
- Ensure that the MGHF maintains its reputation as a role model of excellence and innovation in planned giving by participating actively in local and national professional groups where appropriate, and continually assessing sector best practices.

QUALIFICATIONS AND COMPETENCIES

- Demonstrated experience in the cultivation of donors for major and/or planned giving, together with moves management and experience working with professionals and volunteers. A minimum of 3 years of directly-related fundraising experience or in related finance, insurance or estate planning/administration roles.
- Existing knowledge or ability to learn about a full range of charitable giving vehicles.
- Evidence of superior relationship-building and interpersonal skills to engage stakeholders both internally and externally.
- Fluent verbal communication skills in French and English. Proficient writing abilities in English are required as well as basic writing skills in French.
- Solid working knowledge of computer programs such as Microsoft Office as well as database programs for donor tracking and metric reports. Knowledge of Raiser's Edge will be considered an asset.
- Detail-oriented with ability to multi-task, prioritize and meet deadlines.
- A high degree of personal integrity and tact.
- A strong work ethic, combining energy, enthusiasm, initiative and solid organizational abilities.
- Member of, or prepared to become a member of, the Canadian Association of Gift Planners and the Association of Fundraising Professionals.
- University degree or related education preferred.

BIOGRAPHIES

Jean-Guy Gourdeau, CFA, CPA (CA) President & CEO

Jean-Guy has over 25 years of senior management and financial services experience in organizations such as Richardson Financial Group, Power Financial Corporation, Investors Group Inc, Trilon Financial Group Inc. and Brascan Limited (now Brookfield Asset Management Inc.).

Jean-Guy obtained his Bachelor of Commerce Degree from McGill University, with great distinction as a university scholar, and became a Chartered Accountant in 1987 with the firm Touche Ross. Jean-Guy obtained his Chartered Financial Analyst charter in 1992.



Jean-Guy has been active with non-profit organizations for over 25 years and previously served on numerous other corporate and community boards in Quebec, Toronto and Winnipeg.

Jean-Guy lives in Montreal with his spouse and his two daughters.

Stephanie Riddell Vice-President, Development

Stephanie Riddell joined the Montreal General Hospital Foundation in 2017 as the Vice-President, Development. She has 15+ years of building relationships with stakeholders, in both not-for-profit and private sectors. Stephanie worked for 8 years at McGill University, first raising philanthropic support for the Desautels Faculty of Management and progressed to the role of Senior Philanthropic Advisor, based in the University's central Advancement Office. Previously to those roles, Stephanie worked with the then start-up, Luxury Retreats.



Stephanie is active with community organizations, as Chair of the Board of the Allegra Foundation, on the Marketing Committee of the Dunrae Gardens Elementary School Parent's Association and regularly speaks at advancement seminars such as the Association of Fundraising Professional (AFP) annual speaker series.

Stephanie obtained her Bachelor of Commerce Degree from McGill University, during which she completed a year of intensive business and language studies at the University of Granada, Spain. She is fluent in English, French and Spanish, and lives in Montreal with her husband and two children.

ORGANIZATIONAL CHART: MONTREAL GENERAL HOSPITAL FOUNDATION

