



DIRECTOR OF PLANNED GIVING

PHOENIX CHILDREN'S HOSPITAL

Phoenix, AZ

<https://www.phoenixchildrens.org>



The Opportunity:

Phoenix Children's Hospital is seeking a Director of Planned Giving to support continuous growth efforts at a world class institution. The Foundation is seeking a driven individual for this role to play an important part of a new campaign and help to support rapid advancement of new projects. The Foundation has a demonstrated track record of success. A 5-year, \$250 million expansion campaign began in 2017 and rapidly exceeded expectations as the Foundation raised \$92 million in the first two years alone. As the final year of this campaign approaches, the Foundation is on track to exceed their campaign goal and continue to support the mission to *provide hope, healing and the best healthcare for children and their families.*

The Foundation is currently in the planning stages of their next campaign. With a \$500 million goal, the Director of Planned Giving will play a critical role in helping expand our planned giving program and accomplish our Foundation goals.



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Overview

[Phoenix Children's Hospital](#) has provided hope, healing, and the best healthcare for children since it was established in 1983, growing to become one of the leading pediatric healthcare systems in the country. With a medical staff of nearly 1,000 pediatric specialists, Phoenix Children's provides inpatient, outpatient, trauma, and emergency care across more than 75 pediatric subspecialties, the most comprehensive pediatric care available in the state. The Hospital's [Centers of Excellence](#) have grown in size and expertise to place them on par with some of the most prestigious of their kind in the United States.



Phoenix Children's has been named to [U.S. News & World Report's Best Children's Hospital list](#) for the ninth year in row and, in 2019 – 2020, in all 10 categories. The health system remains Arizona's only children's hospital to be recognized by *U.S. News & World Report* and is one of only 24 children's hospitals in the United States to make the list in all 10 surveyed specialties for 2019 - 2020.

Over the next five years, Phoenix Children's will build on its achievements and accelerate its investments in the people, research, technologies, and programs that will solidify its position as a world-class hospital for decades to come. That means recruiting physician-scientists who will change the shape of medicine from right here in Phoenix; fostering discoveries that will improve the quality and length of children's lives; establishing groundbreaking, destination programs that will attract young patients from around the world; and driving innovations that will give ill and injured children hope beyond their wildest dream.

To meet the needs of its growing community, Phoenix Children's also has continued to expand its facilities. Specialty and urgent care centers in high-growth areas of the Valley and across the state serve the needs



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of patients and families in [their own neighborhoods](#). Today, the most visible evidence of growth is the 11-story tower on the Hospital's main campus, which offers a comprehensive, family-centered hospital that allows doctors and nurses to deliver expert care and healing to the communities' youngest patients.

The [Phoenix Children's Hospital Foundation](#) (PCHF) serves as the fundraising partner to the Hospital and provides needed support for critical programs, capital projects, and a variety of services that are entirely supported by philanthropy. Today, Phoenix Children's Hospital's pursuit of excellence and culture of innovation are propelling it toward a remarkable future.



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The Role - Director of Planned Giving



Reporting to the Vice President, Individual Giving, the Director of Planned Giving will be a seasoned fundraiser responsible for implementing a comprehensive planned giving program that will attract current and deferred gifts in support of the Phoenix Children's Hospital Foundation development goals. Serves as an organizational expert in planned giving and supports all activities involved with cultivation, solicitation and stewardship of donors, Legacy Society, and professional advisors. Success will be achieved by building long term donor partnerships and demonstrating that all levels of philanthropic support are leveraged to realize maximum impact for Phoenix

Children's mission. The ideal candidate will be energetic and enthusiastic, metrics-driven, and is comfortable working in a dynamic and fast paced environment.

Education and Experience:

- Minimum 8 years of planned giving fundraising experience, preferably in healthcare or higher education setting, and ideally with campaign experience.
- Bachelor's degree or Master's in business, philanthropy or related field. MBA or JD preferred. Some experience may be substituted for education.
- A clear understanding of philanthropy and philanthropic practice, in particular the unique individual relationships required to secure planned gifts.
- Strong working knowledge of planned giving vehicles, and knowledge and understanding of tax laws affecting charitable gift planning.
- Fundamental understanding of estate settlement.
- Experience in developing planned giving and charitable gift annuity proposals.
- A proven track record of securing planned and blended gifts.
- Comfort working in a complex organization, with a successful track record in working with Executive Leadership, Board Members, Physicians, and Volunteer Leadership.
- Familiarity with planned giving events, programs and marketing.
- Strong initiative, self-confidence, creativity, and entrepreneurial skills, who enjoys working as a team player but can also work independently as a self-starter.
- Exceptional written and verbal communication skills, and proficiency in Raiser's Edge or other equivalent CRM system.





The Ideal Candidate:

- Professionals with an entrepreneurial spirit, proven track record and ready to be in a newly created role to significantly contribute to a new fundraising campaign for a growing organization.
- Passionate experience fundraising in a children's hospital network.
- Validated experience in program development, advisory boards, and legacy administration. Preferably a JD or experience with estate planning and legal side of large gifts.
- Intrinsically motivated and metrics-driven individual seeking a career where they can build and develop at a top tier organization.
- Clear and concise communication skills are important - partnering with other gift officers and working with donors. Self-managing with potential to manage part of a team once established.



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Position Duties:

- Serve as a member of the Planned Giving team.
- Manage a portfolio of 100-150 prospects for discovery, cultivation, solicitation, and stewardship.
- Work closely with physicians, clinicians, researchers and other medical staff, in a HIPAA compliant manner, to identify prospects and develop cultivation and solicitation strategies.
- Conduct solicitations independently, and with volunteer and senior leadership. Develop solicitation strategies and provide volunteers and senior leadership with the necessary preparation and support.
- Maintain solid knowledge of the strategic fundraising priorities of Phoenix Children's and effectively align donor proposals with these priorities.
- Participate in the planning and execution of program charters for Legacy Society, Planned Giving Advisory Board, stewardship, and cultivation events.
- Participate in overall Planned Giving Program marketing strategies and execution.
- Serve as PCH ambassador and speaker/presenter to outside groups and organizations.
- Cultivate and retain relationships in the professional advisor community.
- Develops and implements, in partnership with Foundation colleagues, donor and prospect cultivation events that include educational events and tours that support strategic fundraising priorities.
- Monitor contract, billing, vendors, and estate settlement activities.
- Meet annual activity and financial performance metrics.

Diversity and Inclusion:

Phoenix Children's Hospital complies with applicable federal civil rights laws and does not discriminate on the basis of race, color, religion, sex, national origin, age, genetic information, physical or mental disability, military or veteran status, sexual orientation, or gender identity/expression.



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Leadership



Steven Schnall
Senior Vice President and Chief Development Officer
Phoenix Children's Hospital Foundation

Steven Schnall has served Phoenix Children's since 1983. In his current role as Senior Vice President and Chief Development Officer, Phoenix Children's Hospital Foundation, Steve provides strategic leadership for all aspects of philanthropy for the Hospital. Under his direction, the Foundation has led numerous successful campaigns that supported development of Phoenix Children's.

Steve's prior roles at Phoenix Children's included Vice President, Business Development and Outreach, where his responsibilities included strategic planning, marketing and public relations, community relations, physician relations, and grants. He has also served as Vice President, Ambulatory Services and additional administrative posts for the Hospital.

Steve is a graduate of Arizona State University where he received a Bachelor of Arts, Psychology. He received a Master of Arts in Organizational Management from University of Phoenix.



Kelley Morris
Vice President, Individual Giving

Kelley Morris joined Phoenix Children's Hospital Foundation in 2019. In her role as Vice President of Individual Giving, Kelley provides leadership and strategic oversight of a team responsible for Major and Principal Gifts, Annual Giving, Planned and Legacy Giving and Foundations. She also serves as a member of the hospital's senior leadership team.

Kelley brings more than 20 years of experience in healthcare philanthropy. Prior to joining Phoenix Children's, Kelley held senior fundraising positions at City of Hope Medical Center, University of Southern California-Doheny Eye Institute, Cedars-Sinai Medical Center and Baylor College of Medicine.

Kelley has a Master's Degree in Health Care Administration from Texas Woman's University, and a Bachelor of Science Degree from the University of Texas Medical Branch.





Send nominations or cover letter and resume to:

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