

Candidate Brief



CEO

June 2023



The South Okanagan Similkameen Medical Foundation (SOS) connects philanthropically minded individuals, corporations, and groups with priority health care needs in the South Okanagan Similkameen region. As the Foundation's leader, the CEO will create a vision for the next level of community and public health care across the South Okanagan and Similkameen region.

The South Okanagan Similkameen region in the southern interior of BC is a vibrant hub of thriving municipalities such as Penticton, Osoyoos, Oliver, Keremeos, Summerland, and Princeton. Nestled among beautiful countryside, mountains, Lake Okanagan on the north and Skaha Lake on the south, world-class golf, skiing, and vineyards, it offers something for all.

In recent years the Foundation leadership has recruited new Board members, completed a number of fundraising initiatives, and established key foundational policies, procedures, and other infrastructures. The Foundation now seeks a new CEO to build on these recent changes and:

- Establish relationships with committed and passionate donors and health care staff;
- Contribute meaningfully to public health while it is most important and topical;
- Complete a compelling Oncology campaign, and plan for future priorities;
- Leverage and engage an open and intentional Board of Directors;
- Partner with the Board and community leaders on the long-term visioning for the Foundation, including a plan for a significant land asset;
- Harness the strengths of a dedicated and mighty staff team of six;
- Become a member of a generous and fun community and remind residents that their giving makes a significant difference in the lives of people in the region.

ABOUT THE SOUTH OKANAGAN SIMILKAMEEN MEDICAL FOUNDATION

The South Okanagan Similkameen Medical Foundation was established in 1981 as the official fundraising body for the hospitals and health services facilities of the South Okanagan and Similkameen area.

Its mission is: *"The South Okanagan Similkameen Medical Foundation is dedicated to the achievement of excellence in supporting the delivery of health services to our region."*

The SOS Medical Foundation works to promote and encourage healthy lifestyles, health services delivery, equipment acquisition, staff development, and volunteer promotion. The Foundation uses donations to purchase medical equipment, fund elder care in extended care homes, palliative care, nurses' training, and medical research at healthcare facilities throughout the South Okanagan Similkameen.

The region stretches from Summerland south to Osoyoos and west to Princeton – a very large and diverse area which contains multiple hospitals and medical support facilities. These facilities are anchored by Penticton Regional Hospital, a true “regional” hospital which contains specialized services to benefit all regional residents.

In fact, the Foundation fundraises for more locations than any other hospital foundation in BC. They include:

Penticton

- Penticton Regional Hospital
- Braemore Lodge, Psych Rehab Center & Retirement Home
- Westview Extended Care
- Penticton Health Center/Community Health Center
- Penticton & District Hospice Society, Moog & Friends Hospice House
- Trinity Center, Assisted Living

Princeton

- Princeton General Hospital
- Ridgewood Lodge, Residential Care Facility

Osoyoos

- Osoyoos Health Center/Community Health Center

Keremeos

- Orchard Haven Seniors Care Home
- South Similkameen Health Center/Community Health Centre

Oliver

- McKinney Place Seniors Care Home
- South Okanagan General Hospital (SOGH)
- Sunnybank Center Retirement Center

Summerland

- Dr Andrew Pavilion Seniors Care Home
- Summerland Outpatient Health Center/Community Health Center

Recent Accomplishments & Current Priorities

The Foundation is grateful for the over 1,800 donors who support the Foundation annually through a variety of channels and initiatives. Over the past 5 years the Foundation has paid out over \$30.1M in donations for healthcare equipment and other improvements such as:

- A successful \$600,000 campaign to support a CT Scanner purchase
- Ultrasound for Cardiology Care
- Rheumatoid Arthritis Patient Care Research
- Ventilator Upgrades
- LIFEPAK 15 monitor/defibrillators
- Bariatric bed
- EEG Machine for Neurology
- Specialized Beds and Blanket Warmers
- Art beautification: Outdoors Sculpture and other Artwork
- Patient Comforts and Programming



Its largest ever fundraising campaign was the successful \$25 million campaign for the construction of the David E. Kampe Tower at the Penticton Regional Hospital. Although David Kampe was the biggest donor to the hospital, hundreds of additional donors stepped forward and donated to the campaign, including significant gifts to name 84 patient and clinical rooms.

Revenues: The Foundation's revenues totalled just over \$4.1 million last year, of which of about \$3.4 was from donors, and the balance from the SOS Café and investment income. The Foundation's main fundraising sources include:

- Realized estates: about \$1.5 million was raised last year; the Foundation has a strong gift planning program with about 40 estates in probate and another 50 on file.
- Over \$1 million from individual supporters, including a \$500,000 gift. The Foundation has roughly 1800 active donors every year.
- A further \$300,000 from other foundations, clubs, and associations.
- Hospital auxiliaries are very strong supporters, having contributed about \$235,000 last year.

Current campaign: The "Better Care. Better Outcomes." campaign is underway, bringing more cancer care closer to home for residents of the South Okanagan and Similkameen. The Foundation's goal is to raise \$10 million towards the \$22 million capital investment in the Penticton Regional Hospital's Community Oncology Network clinic. The planned expansion of the oncology clinic at PRH will benefit residents across the region as patients and families will continue to be able to receive medical oncology treatments and follow-up care closer to home. The project will nearly double the capacity of the existing department, enhance the delivery of care, and offer a warm and welcoming environment that promotes privacy and support.

Finally, in November, the Foundation will hold its first ever gala to raise funds and awareness for the Foundation's important work.

For more information about the Foundation, see <https://sosmedicalfoundation.com>. Audited financials are available by request.

CEO MANDATE & RESPONSIBILITIES

The CEO is responsible for the strategic and operational leadership of the Foundation, ensuring financial management of donor funds, and advancing participation and philanthropic support for all health services in the South Okanagan Similkameen area. The CEO reports to the Board, through the Chair, and leads a dedicated team of six, including two SOS Café staff. The full Board and staff listing can be found at <https://sosmedicalfoundation.com/the-team/>.

The CEO participates with the Board on the development of the Foundation's Strategic Plan and leads the Annual Business Plan. The CEO demonstrates effective management practices by creating annual work plans based on strategic initiatives, values, mission, and purposes of the Foundation. The CEO is responsible for the health of the donor base inclusive of retention and acquisition, measuring and developing fundraising and as the face of the Foundation, is the main contact for major donors and other key stakeholders.

More specifically the CEO's responsibilities include:

Strategic & Operational Planning

- Ensuring all fundraising programs and initiatives in support of the Foundation contribute to its mission statement and reflect the priorities of the Board of Directors.
- Liaising with key hospital and Interior Health Authority leadership, in particular the CEO Clinical Operations and the Chief of Staff, to discuss priority funding needs and patient care opportunities.

Fundraising

- Maintaining an active portfolio of major donor prospects and assuming responsibility for a portfolio of key donors for personal visits, relationship development, solicitation, and stewardship activities.
- Establishing effective relationships with community services organizations, local educational and government departments, and corporate donors to advance the goals of the Foundation.
- Communicating with stakeholders and donors, explaining the Foundation's campaigns, programs, fundraising events, and developments which enhance the health services provided to the residents in the South Okanagan Similkameen region.
- Ensuring the planning and execution of donor recognition and stewardship.

Communications & Community Outreach

- Serving as the Foundation's primary advocate and spokesperson in the South Okanagan Similkameen communities with the goal of increasing awareness and understanding of the role of the Foundation.
- Developing and overseeing the Foundation's communication strategies by collaborating with communications staff in the drafting of a communication plan that reaches all of the South Okanagan Similkameen region and the Interior Health Authority.
- Participating in community activities, and Hospital and Foundation committees as needed.
- Ensuring that the branding and messaging associated with all Foundations communications mediums (website, annual report, social media, physical banners, newspaper column, public facing posters, etc), are consistent with the Branding & Style Guide while supporting the goals of the annual communications plan.



Staff & Volunteer Leadership

- Directing the day-to-day operations of the Foundation office and the South Okanagan Similkameen Café by implementing a performance management program with goals and objectives to assist monitoring performance.
- Keeping the Board of Directors proactively informed of key fundraising, marketing initiatives, and key community collaborative ventures.

Administration & Due Diligence

- Establishing and overseeing policies and procedures related to the implementation and management of effective professional fundraising programs.
- Overseeing the financial performance of the organization, managing, and responding to revenue and expense variations.
- Directing staff and other resources where appropriate to meet the goals of the Foundation.
- Keeping current the Compliance Checklist, ensure completion of all statutory and regulatory reporting, protect the charitable status of the Foundation, and confirm insurance requirements are met.

CANDIDATE PROFILE

The Board, staff, and constituents of the Foundation believe that the new CEO should be:



An Achiever and Fundraiser. Action-oriented individual who likes to fundraise and leads by example. Optimistic, with a “can-do” attitude. A translator of long-term ambitions into actionable steps. An asker, keen to develop donor relationships and solicit gifts when the time is right. Willing and able to explore new techniques and fundraising models. Pragmatic and defaults to action. Understands the need for good processes while always keeping the donor relationship in mind.

An Effective Community Builder. A warm and outgoing presence in the community, who appreciates the SOS’s unique and diverse constituent needs. An exceptional listener, learner, and storyteller. An individual who is flexible and adaptable to integrate into the community. An engaging personality, not caught up in hierarchies or titles. Inclusive and curious. Compassionate, credible, kind, honest, and authentic. Emotionally intelligent and culturally informed. Both adaptable and assertive to partner effectively with IHA and our hospital and facility partners.

A Strong Team Leader. Encouraging and supportive of a collaborative team. Someone who recognizes accomplishments and celebrates wins. Clear when giving directions and sharing goals, and who course-corrects quickly when needed. Approachable and compassionate to individual circumstances. A cohesive builder of connections between the staff and Board, and who communicates effectively with the Board. Able to establish and maintain boundaries among multiple constituent groups. Able to receive and give feedback.

A Strategist and Visionary. Ambitious and compelling, who sees long term potential, and is excited by the transformation it will bring. Politically savvy to unite different views and plans into a cohesive whole. Someone who can effectively prioritize and say “no” with tact and diplomacy. An enabler of donor dreams and aspirations into ambitious medical needs. A creative and optimistic enable who sees the art of the possible.

The ideal CEO will possess the following qualifications:

- Significant experience in fundraising, fundraising leadership, and donor relationships, preferably from a hospital, healthcare, or community health environment.
- An extensive and clear understanding of a comprehensive fund development program, including annual and monthly giving, major gifts, and planned giving.
- Significant experience in any combination of major giving, planned giving, and campaign planning is strongly preferred.
- Strong understanding of priority setting, strategic planning principles and best practices.
- Broad-based leadership and management experience, including the ability to grow staff skills and delegate effectively. Experience in a unionized environment is helpful.
- Experience working with high-level volunteers, in particular a Board of community leaders.
- Strong leadership and decision-making skills with an exceptional capability for resolving conflict in an open and consultative manner.
- Familiarity with Raiser's Edge NXT fundraising software, or an equivalent.
- Commitment to professional and personal growth, through education and participation in professional fundraising organizations and initiatives. CFRE designation is an asset, as is membership in AHP, AFP, and/or CAGP.
- A university degree or equivalent coursework and experience.
- Residency in the South Okanagan region is required, as is travel throughout the region by car.

Position Skills and Competencies

- Excellent interpersonal skills with the ability to communicate effectively at all levels.
- Demonstrated leadership skills and the ability to inspire and motivate a team of senior staff from different disciplines to achieve success.
- Demonstrated creative thinking and the ability to develop solutions within challenging environments.
- Demonstrated experience developing fundraising plans, budgets, performance reports, and allocation of resources.
- Adept at working with volunteers, including leveraging and supporting the Foundation Board of Directors.
- Demonstrated experience and success in donor acquisition, setting and achieving financial targets through individual and corporate donations.
- Ability to negotiate and manage complex contracts and relationships.
- Experience developing and negotiating funding for large, complex capital projects.
- The ability to provide strategic counsel to the Foundation in the context of broad-based health perspective.
- Ability to work under pressure, with time constraints and in a rapidly changing environment, and manage multiple projects simultaneously.
- Politically and corporately astute with excellent financial and analytic abilities; an in-depth knowledge of the BC healthcare environment is an asset.

APPLICATION AND SELECTION PROCESS

To apply or learn more, please contact the Foundation's search partner, Christoph Clodius at The Discovery Group, christoph@thediscoverygroup.ca.

Application packages - a CV & cover letter, ideally in the same document – are requested by July 21, 2023. The Foundation has an interim CEO in place and are hoping to have a new incumbent start by September.

Compensation & Benefits:

The Foundation has targeted a compensation range of \$140,000 to \$170,000. SOS offers an exceptional benefit plan including extended medical and dental coverage (with premiums paid by the Foundation), 5 weeks' holidays, an RRSP match equivalent to 10% of salary, ongoing training and pro-D support, and much more.

As a small community hospital Foundation, the CEO will have some flexibility in place of work but is expected to be on-site in the office at least 3-4 days per week.

Equity & Diversity: We encourage applications from members of groups that have been marginalized on any grounds under the B.C. Human Rights Code, including sex, sexual orientation, gender identity or expression, racialization, disability, political belief, religion, marital or family status, age, and/or status as a First Nation, Metis, Inuit, or Indigenous person.

ABOUT PENTICTON AND THE SOUTH OKANAGAN SIMILKAMEEN REGION

Location and Population

The charming city of Penticton is beautifully situated in the Okanagan Valley between Lake Okanagan and Skaha Lake, nestled amongst the Cascade and Coastal Mountain ranges in southern British Columbia. The name 'Penticton' loosely translates from nsyilxcən (the indigenous Syilx/Okanagan peoples language) as 'the place to stay forever', and undoubtedly it will be a place you won't want to leave. The small interior city of nearly 33,000 residents, boasts over 2000 hours of sunshine annually, coupled with access world-class skiing, mountain biking, golf, hiking, and boating. Nearby cities like Vancouver, Calgary, and Seattle are easily reached in under one hour, by way of the Kelowna International Airport, north of Penticton along Highway 97.



Recreation & Culture

Penticton's location in the heart of the Okanagan Valley, makes it a prime destination for great food and wine lovers. The longer, warmer growing season gives prominence to orchards, vineyards, and local organic farming. Penticton is situated in the heart of Canada's wine country, which is home to over 130 vineyards with such notable wineries as Burrowing Owl, Quail's Gate and Laughing Stock nearby. Lonely Planet also dubbed Penticton Canada's craft beer capital in 2020.

The city is a home to outdoor enthusiasts, where mountain biking or skiing after work is not unheard of. Known for some of the most beautiful beaches in Canada, Skaha Lake features warm water for swimming and long stretches of sandy beach. Penticton is great place to hop on the Kettle Valley Rail trail, formerly a railway it is now one of Canada's longest recreational pathways connecting nearly 650kms of bikeable, runnable trails.

Housing

Finding the right home in the right location in Penticton is made easier knowing that no matter which neighbourhood you live in, the average commute time to Penticton is 15 minutes, according to Statistics Canada. The housing market in Penticton, although strong allows many



affordable options compared to other BC communities; the average price of a single family, detached home was \$658,000 in 2022. Neighbouring communities including Peachland, Summerland, Oliver, and Naramata also offer affordable housing options with easy, reasonable commutes.