



# South Okanagan Similkameen Medical Foundation

## EXECUTIVE DIRECTOR

### CONTEXT AND OPPORTUNITY

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

This is a compelling opportunity for a fundraising professional to:

- Establish relationships with committed and passionate donors and health care staff;
- Contribute meaningfully to public health while it is most important and topical;
- Lead a collaborative process to determine the Foundation's ongoing fundraising priorities;
- Leverage and engage an open and intentional Board of Directors;
- Harness the strengths of a caring and dedicated staff;
- 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

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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.

The region’s facilities are:

- Penticton Regional Hospital
- Trinity Centre, Penticton
- Moog & Friends Hospice House, Penticton
- Summerland Health Centre
- Dr. Andrew Pavilion, Summerland
- South Okanagan General Hospital, Oliver
- Sunnybank Centre, Oliver
- McKinney Place, Oliver
- Osoyoos Health Centre
- Princeton General Hospital
- Ridgewood Lodge, Princeton
- South Similkameen Health Centre, Keremeos
- Orchard Haven, Keremeos
- Penticton Health Centre
- Braemore Lodge, Penticton

### Recent Accomplishments & Current Priorities

The Foundation raises an average of about \$5.5 million (including the recent years’ major campaigns) from over 1,700 donors annually, through annual appeals, monthly giving, gifts of stock, estate gifts, and other contributions.

The Foundation completed its largest ever fundraising campaign last year with over \$25 million raised for



the construction of the David E. Kampe Tower at the Penticton Regional Hospital. Although David Kampe was by far 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.

In the past few years the Foundation also set up a \$2.4 million endowment funded by an estate gift; added a permanent MRI and Spect-CT scanner at PRH; raised over \$600,000 for South Okanagan General Hospital in Oliver; and, through the generosity of the Summerland

Health-Care Auxiliary, recently installed a new X-ray unit at the Summerland Health Centre.

Currently, the Foundation is raising the remaining \$600,000 of a \$3 million CT scanner campaign. This CT will help reduce the heavy demand on the existing machine and provide emergency patients with an immediate scan as required.

As well, donors are being encouraged to support the Healing Power of Art Fund. Art is a significant factor in providing comfort to people as it creates an environment of reflection and thought, as seen through the impressive creations in the new David E. Kampe Tower.

For more information about the Foundation, see <https://sosmedicalfoundation.com>.

## EXECUTIVE DIRECTOR MANDATE & RESPONSIBILITIES

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The Executive Director 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 Executive Director reports to the Board, through the Chair, and leads a dedicated team of five, including two SOS Café staff. The full Board and staff listing can be found at <https://sosmedicalfoundation.com/the-team/>.

The Executive Director participates with the Board on the development of the Foundation's Strategic Plan and leads the Annual Business Plan. The Executive Director demonstrates effective management practices by creating action plans based on strategic initiatives, values, mission, and purposes of the Foundation. The Executive Director is responsible for expanding the donor base, assessing current fundraising programs and developing new ones, delivering on approved commitments, and is the main contact for major donors while being the public face of the Foundation.

More specifically the ED'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 Executive Director 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.

## 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.
- Actively engaging the Board, ensuring the Board's knowledge and participation in fundraising activities, financial due diligence, and community leadership.

## Administration & Due Diligence

- Establishing and overseeing policies and procedures related to the implementation and management of effective professional fundraising programs.
- Ensuring income and expenditure targets are met through budgetary management and resource allocation and providing the Board of Directors with monthly financial and performance reports of affiliated revenue sources.

## CANDIDATE PROFILE

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

A Community Builder. An outgoing presence in the community. 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.

A 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.

An Achiever. Action-oriented individual who 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.

Passionate. Big hearted and kind. Credible and authentic. Emotionally intelligent. Culturally sensitive. Considerate of existing community connections and relationships. Empathetic.

The ideal Executive Director 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 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.
- 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

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The Board of Directors has engaged The Discovery Group, a leading Vancouver-based recruitment consultancy firm, to support their recruitment efforts. Expressions of interest and nominations are welcome.

To learn more or to apply, please contact Christoph Clodius, Vice President of The Discovery Group, at 604-836-1972, or [SOSMF@thediscoverygroup.ca](mailto:SOSMF@thediscoverygroup.ca).

All submissions should be received by November 6, with the selection process and interviews taking place through the late fall. Our goal is to have a new ED in place in early 2021.

## ABOUT PENTICTON AND THE SOUTH OKANAGAN SIMILKAMEEN REGION

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### 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 [nsyilxcen](#) (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 37,000 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. The price of a single family, detached home was \$549,000 in 2019. Neighbouring communities including Peachland, Summerland, Oliver and Naramata also offer affordable housing options with easy, reasonable commutes.