Senior Director, Planned Giving Administration  
City of Hope  
Duarte, CA (Greater Pasadena/Los Angeles)  
www.cityofhope.org

Send Nominations or Cover Letter and Resume to:  
Anne Norton  
Search Director  
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City of Hope is a renowned, independent biomedical research institution and comprehensive cancer center committed to researching, treating, and preventing cancer, with an equal commitment to curing and preventing diabetes and other life-threatening diseases.

The rich history of City of Hope began in 1913, when a group of volunteers, spurred by compassion to help those afflicted with tuberculosis, raised money to start a free, nonsectarian sanatorium. Today, City of Hope is still powered by philanthropy, and is recognized worldwide for compassionate patient care, innovative science, and translational research.
Since its founding, City of Hope has been unwavering in its tackling of catastrophic diseases such as cancer, diabetes, and HIV/AIDS. Today, City of Hope is one of only 45 comprehensive cancer centers in the nation, the highest recognition bestowed by the National Cancer Institute. City of Hope is also a founding member of the National Comprehensive Cancer Network, with research and treatment protocols that advance care throughout the nation. City of Hope has been ranked as one of the nation’s best Cancer Hospitals by U.S. News & World Report for over 10 years. With particular excellence in bone marrow and stem cell transplants, its program is one of the largest and most successful in the world, with unrivaled survival rates.

As City of Hope looks toward the next 100 years, it continues its mission and commitment to transform the future of medicine.

Click here to learn more about City of Hope’s record of distinction and innovation, and here to view City of Hope’s 2015 annual report.

The Opportunity:

This is a tremendous opportunity for an experienced planned giving administrator to join a world-class healthcare institution in a leadership role. Candidates must have deep and extensive technical knowledge of complex gifts across the planned giving spectrum; a proven management style that embodies excellence and collaboration; and the ability to work seamlessly with colleagues across several departments. In this role, the Senior Director, Planned Giving Administration will manage a staff of four whose collective roles support the full slate of operations and marketing of the gift planning program at City of Hope.

City of Hope Philanthropy – Transforming the Future of Health

The Office of Philanthropy's vision is to support the life-saving work of City of Hope by being known institutionally and nationally as a model of excellence among elite fundraising programs. Raising the philanthropic resources to fuel leading-edge research, exquisite and compassionate clinical care, and
advancement of biomedical education and training drives the City of Hope's Office of Philanthropy — and each member of the Office of Philanthropy is a stakeholder in this work.

An integral and respected team within the City of Hope community, the Office of Philanthropy is led by Chief Philanthropy Officer Kristin Bertell. A visionary, warm, and compelling leader, Bertell is committed to creating one of the premier philanthropy programs in the country. President and CEO Robert Stone is a trusted partner who is actively engaged in philanthropy and tireless in his work with donors. Buoyed by City of Hope's culture of collaboration and innovation; its compelling mission; its national and community outreach success; and its productive working relationships with physician-researchers, the Office of Philanthropy is poised to drive transformational impact.

Bertell and her team of expert, seasoned fundraising leaders are committed to growing revenue from its current level of nearly $135M raised last year to $225M annually in four to five years. The senior team has implemented an innovative new organizational structure that features a new layer of leadership that will bring the team size to 140 in anticipation of a comprehensive campaign. While the precise shape and scope of upcoming campaign efforts will be determined in the next 18 months, City of Hope will engage in a historic campaign effort in the coming years, with an early goal estimated at $1.5B.

Office of Philanthropy leaders at City of Hope share a commitment to recruiting top national talent, to maximizing team performance, and to developing and leveraging individual team members. The team's professional and support staff in Southern California and in field offices across the country work with 700 research and clinical colleagues and 45,000 volunteers nationwide. City of Hope is seeking professionals who place team before individual achievement, are creative and innovative, have mission passion and intellectual curiosity, are collaborative yet personally accountable, and can “connect the dots” between their work and the work of others on behalf of donors and philanthropy.

To learn more about City of Hope's perspectives on talent and culture, please view their new digital brochure at the end of this document, specifically designed for individuals considering a professional career move to advance philanthropy at City of Hope.
Senior Director, Planned Giving Administration

Under the direction of the Vice President, Planned Giving, the Senior Director, Planned Giving Administration will contribute to City of Hope’s vision by supporting and role modeling a commitment to key processes and programs that sustain an office-wide focus on collaboration, efficiencies, and metrics-based outcomes. By providing strong individual contribution and direct report management, the Senior Director will be a part of creating City of Hope’s evolution into a perpetually campaign-ready, donor-centered, leading industry program. In pursuit of this outcome, City of Hope is committed to growing careers within the Office of Philanthropy to attract and retain the most talented professionals in the country, and excel as a highly collaborative, efficient, and creative team.

The Senior Director will have demonstrated and significant knowledge of administering and reporting on planned giving vehicles in a large and complex setting, including charitable gift annuities, real estate and other non-cash tangible properties, charitable remainder and lead trusts, testamentary trusts, bequests, life insurance policies, and retained life estates. The Senior Director must understand the nuances and peculiarities of planned giving programs and the relevant legal, financial, and administrative regulations, as well as demonstrate success at building productive internal and external relationships with program vendors, legal and finance experts, and others necessary for program administration.

The ideal candidate will have a minimum of 3-5 years’ supervisory experience, with the proven ability to foster and reward success, provide course correction as needed, and motivate a team around shared and individual goals. The Senior Director will have exhibited the ability to understand individual and team goals in a larger institutional context, and provide insight into program and people management in alignment with larger institutional goals. S/he will have displayed commitment to accountability and collaboration, and the ability to support this same commitment in direct reports.

Specifically, the Senior Director will:

- Oversee programmatic and technical operations of the City of Hope’s trusts and bequests programs, including estate administration, planned giving marketing, and program analysis;
- Oversee the ongoing administration of all planned gifts, including: charitable remainder trusts, the charitable gift annuity program, and the bequest administration function in accordance with terms of the applicable instruments and in a manner consistent with the needs of principals, beneficiaries, and remainder beneficiaries;
- Supervise four staff members (Planned Giving Analyst, Legal/Probate Assistant, Director of Planned Giving Marketing, and Legacy of Hope Society Analyst);
- Advise other staff members regarding trust and estate administration; and
• Develop and maintain relationships with appropriate investment, legal, and other professionals to administer the program.

**Key Responsibilities Include:**

**ADMINISTRATION**

• Meet annual activity and financial performance metrics;
• Analyze and implement programs to ensure cost effectiveness;
• Oversee daily operations of trusts and bequests program;
• Assist with management of life income portfolio and review various investment and program-related reports;
• Develop and maintain ongoing relationships with program vendors, legal experts, and others necessary to running the program;
• Serve as a liaison with City of Hope’s Office of General Counsel, investment and finance offices, and Philanthropy data services team;
• Provide strategic oversight in creating tools for the Office of Philanthropy to increase awareness of — and participation in — planned giving, including: mailers and marketing material, the annual recognition event, and the giving society;
• Lead the preparation of monthly/quarterly/annual planned giving reporting;
• Provide knowledge, support, and advice to planned and major giving colleagues to inform donor solicitations, proposals, and stewardship;
• Analyze and report on trends, outcomes, and projections for City of Hope’s gift planning program; and
• Stay attuned to planned giving trends, opportunities, and related legislation, and provide regular updates to colleagues.

**MANAGEMENT**

• Manage and serve as a mentor for staff on all content and professional development areas, including: serving as a resource in developing strategies, conducting ongoing conversations regarding performance in relation to metrics, and articulating opportunities for employees’ growth and professional development in a thoughtful manner;
• Demonstrate an ability to solve problems, overcome hurdles, and navigate sensitive issues with discretion, tact, and strong communication skills;
• Contribute to employee development throughout employees’ tenure: from interviewing and making thoughtful hiring decisions and participating in onboarding of new employees, to contributing to high employee retention within the Office of Philanthropy;
• Possess a thorough knowledge of the key fundraising priorities for City of Hope;
• Meet established performance goals for the reporting team; and
• Undertake special projects as assigned.

LEADERSHIP
• Serve as a spokesperson for City of Hope activities as requested;
• Participate in meetings, search committees, task forces, and other special projects;
• Maintain a positive image when dealing with executive staff, donors, prospects, fundraisers, and other City of Hope employees; and
• Practice a high level of integrity and honesty in maintaining confidentiality.

Minimum Education and Skills Required for Consideration:

• Bachelor’s Degree;
• Must have a minimum of 5+ years of related experience;
• Minimum of 3+ years of management experience;
• Proficiency in MS Office, Crescendo, and PG Calc; and
• This position requires travel, irregular hours, and communication with volunteers outside regular business hours.

Preferred Education and Skills:

• Advanced degree strongly preferred;
• Certified Specialist in Planned Giving;
• Certified Financial Advisor or Estate Planning Attorney; and
• Strong understanding of the issues, nuances and needs of research, teaching and clinical operations in a complex health sciences research and/or university environment.

City of Hope strongly supports and values the uniqueness of all individuals and promotes a work environment where diversity is embraced. City of Hope is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, religion, color, national origin, sex, sexual orientation, gender identity, age, status as a protected veteran, or status as a qualified individual with disability.
Office of Planned Giving

The Office of Planned Giving at City of Hope realized $26M last year in matured planned gifts, and the team is in the process of being poised to build a $50M planned giving program in the next 5 years. Most of planned giving currently comes from bequests, most of which are unrestricted. There is growth potential in lead trusts and other vehicles, including expanding the grateful patient program. The team benefits from excellent outside counsel when navigating more complex gift arrangements, and follows a set of metrics around numbers and amounts of gifts, as well as the number of active solicitations.

Across the Office of Philanthropy, staff are deeply invested in City of Hope: its mission, its history, its impact, and its potential. Candidates who bring caring intent and emotional thought to their work will thrive in the culture of the Office of Planned Giving, the Office of Philanthropy, and the City of Hope community.

Office Leadership

Amy Goldman

Vice President, Planned Giving

As a Vice President of Philanthropy for City of Hope, Amy Goldman oversees all the activities of the Planned Giving Department. She is responsible for the development, implementation, and oversight of a comprehensive planned gift program. Goldman has over 20 years of experience in planned giving. Before joining City of Hope, she worked for the Jewish Home for the Aging and the University of Judaism. She holds a bachelor's degree from University of California, Los Angeles, and a master's degree in nonprofit administration from the University of Judaism.
City of Hope Leadership

Led by President and Chief Executive Officer Robert Stone and Chief Philanthropy Officer Kristin Bertell, City of Hope’s philanthropy efforts are embraced and championed by executive, medical, research, and care team colleagues across the community.

Robert W. Stone
President and Chief Executive Officer

As President and CEO of City of Hope, Robert W. Stone sets the strategic vision for City of Hope, driving business development and maximizing potential growth. He leads a diverse team of talented high-level individuals committed to humanitarian service and to ensuring access to the institution’s breakthrough discoveries and specialized therapies.

In his career at City of Hope, Stone has served in roles of increasing responsibility. He joined City of Hope in 1996 as associate general counsel and was promoted to general counsel for the medical center in 2000. In 2003, he was named City of Hope’s general counsel and corporate secretary. He became City of Hope’s chief strategy and administrative officer in 2009, leading the creation and development of the organization’s 10-year strategic plan.

Stone also served as president and executive officer of the City of Hope Medical Foundation, an entity launched in June 2011 to increase collaboration between physicians and staff and to enable more coordinated care for patients. In this role, Stone worked with the foundation board to plan, design, and implement the foundation strategy. He was also responsible for the day-to-day management of the foundation, including overseeing the foundation-operated clinics, the management services staff of the foundation, and managed-care contracting for City of Hope.

As president of City of Hope, a role he assumed in August 2012, Stone is responsible for executing the strategy for the larger institution, guiding business development, and overseeing all operational, financial, human capital, and strategic functions. He assumed the dual role of chief executive officer in January 2014.

Prior to City of Hope, Stone was a practicing attorney at the firms of Christa & Jackson and Hanna and Morton. He earned his law degree at the University of Chicago Law School.

To read about President Stone and Dr. Stephen Forman’s interview with Charlie Rose, please click here.
Kristin Bertell
Chief Philanthropy Officer

Kristin Bertell is Chief Philanthropy Officer at City of Hope and a member of City of Hope’s Executive Team. In this role, Bertell provides strategic leadership for all aspects of City of Hope’s philanthropic efforts as the cancer treatment center and biomedical research institution enter a new era of growth and development.

Bertell is an accomplished leader with more than 26 years of expertise in nonprofit fundraising, including comprehensive campaigns for research and academic medical centers. Prior to joining City of Hope, Bertell served as associate vice chancellor, health sciences development, for University of California, San Diego, where she was responsible for donations to support their clinical, research, and academic priorities.

Prior to UC San Diego, Bertell served as senior vice president of The Greenwood Company, a San Francisco-based nonprofit fundraising consulting firm, and as vice president of institute relations for the Salk Institute for Biological Studies in La Jolla. She has also held development leadership roles at University of Southern California’s Keck School of Medicine, California Lutheran University, Greater Southeast Healthcare System, and the Autism Society of America.

She is a graduate of University of California, Los Angeles, and holds a master’s degree in communications management from the Annenberg School for Communication and Journalism at the University of Southern California.

Bertell is a certified fundraising executive with the National Society of Fund Raising Executives and was named the 2014 Outstanding Fundraising Professional by the Association of Fundraising Professionals, San Diego Chapter.
Location

**Southern California and Duarte (Greater Pasadena/Los Angeles):**

As the Office of Philanthropy notes in their recruitment brochure, Southern California is an ideal location to create the ultimate work-life balance, with trend-setting metropolitan cities, urban and natural landscapes, sprawling beaches, and eclectic entertainment options.

Located 21 miles northeast of Los Angeles and 10 miles from Pasadena, City of Hope's leading-edge medical and research facilities in Duarte, CA, are surrounded by lushly landscaped gardens and open spaces. Its community practices bring premier care to local communities in Los Angeles and Riverside Counties.

Duarte is known as the City of Health, a small progressive community located in Los Angeles County at the base of the picturesque San Gabriel Mountains. At 6.8 square miles and a population of 21,486, Duarte is a richly diverse community of stable neighborhoods and friendly neighbors, surrounded by other similar communities, such as Monrovia and Arcadia. Green foothills, parks, hiking and bike trails, and beautiful new social and recreational gathering places enhance the livability of the community. The Duarte Unified School District serves students from Duarte, Bradbury, and unincorporated communities to the south of Duarte and Monrovia. Within Duarte, there are also five licensed private schools. To view a brief video about Duarte, please click [here](#).

**Background Checks:**

Prior to submitting your resume for this position, please read it over for accuracy. LLLS does verify academic credentials for its candidates, and our clients frequently conduct background checks prior to finalizing an offer.
To learn more, call
Anne Norton, Search Director at
617-262-1102
or send nominations or cover letter and resume to
anorton@LLLSearches.com.
All inquiries will be held in confidence.
ADVANCE YOUR PASSION. CHANGE THE WORLD.
JOIN CITY OF HOPE’S PHILANTHROPY TEAM

City of Hope
OFFICE OF PHILANTHROPY
I CAME HERE AND
I WAS GIVEN HOPE AGAIN.
City of Hope offers options that other hospitals
don’t. That is because this is a place of progress,
where researchers are working every single day
developing new ways to fight cancer. City of Hope
has a sense of humanity. There are little pockets of
joy, pockets of life, pockets of hope everywhere.
This is the place that saved my life.”

CHRISTINE PECHERA
Survivor, non-Hodgkin lymphoma

EVERY DAY IN THE
OFFICE OF PHILANTHROPY,
WE SEE THE IMPACT OF OUR WORK
THROUGH THE PATIENTS WE SERVE,
BOTH HERE AT CITY OF HOPE AND
AROUND THE WORLD.
At City of Hope, we advance science to make lives whole again. As a world leader in the research and treatment of cancer, diabetes and other serious diseases, our scientists partner with doctors to transform laboratory breakthroughs into treatments that save lives. We call it “bench to bedside science.” Our patients call it miraculous.

In the global pursuit of scientific breakthroughs in the fight against deadly diseases, City of Hope is among those leading the charge. As an independent research facility, our world-renowned scientists have made advances that have fundamentally expanded the world’s understanding of how biology influences diseases such as cancer, HIV/AIDS and diabetes.

And, we live our commitment to scientific innovation. We are the only non-academic medical and research center in the nation with three FDA-approved manufacturing facilities for small scale therapeutics production for use in clinical trials. Made possible by philanthropy, the goal is singular: to speed treatments to patients so they receive healing now, not years from now. One of only 47 medical centers designated a comprehensive cancer center by the National Cancer Institute – the highest level of recognition the agency bestows – in any given year, City of Hope conducts more than 400 clinical trials enrolling over 6,000 patients. Our discoveries impact 100 million people a year.

Upholding the mantra that “There is no profit in curing the body if, in the process, we destroy the soul,” patients and loved ones benefit from a City of Hope clinical tradition that treats and heals through integrated physical, emotional and spiritual approaches. By offering exquisite care, conducting innovative research and championing vital education, our experts draw practical benefits from the mysteries of science and work to save and change lives. In short, we turn hope into reality—and change medicine for people around the world.

"At City of Hope our mission is to transform scientific research into new drugs and treatments that will improve as many lives as possible—as soon as possible. We are an agile, inventive and growing research and medical enterprise focused on next generation medicines.

This is a truly inspiring place to work, where you see the impact of your effort in discoveries made and lives saved.”

ROBERT W. STONE
President and Chief Executive Officer
A MISSION
YOU CAN BE
PASSIONATE
ABOUT.
A VISION TO GET
YOUR HEART
PUMPING.

COMPASSION
Founded in 1913 to provide free care to tuberculosis patients, our mission has remained steadfast. We have spent over a century bringing compassion, healing and hope to people facing difficult diseases.

GENEROUS
Philanthropy is in our DNA. Since our founding, donors from across the country have supported and influenced our vision to give people dignity and help them live longer, better lives.

AGILE
City of Hope has a flexibility that larger institutions typically lack. Innovative concepts move quickly from the laboratory to patient trials – and then to market, where they benefit people around the world.

ENTREPRENEURIAL
Not satisfied with the typical lengthy process involved in manufacturing drugs for testing, we built our own facilities. This demonstrates our entrepreneurial and agile spirit, which permeates our entire enterprise, including our approach to philanthropy.

INGENUITY
The power and promise of medical science drives our work and provides a tremendous sense of purpose. Discoveries made in our labs kicked off the biotech industry, which we continue to lead with seminal discoveries and developments saving the lives of millions around the world. We hold over 300 patents and have almost 30 drugs in the pipeline at any given time.

POWERFUL
A pioneer in cell transplantation, our program has been recognized for its excellence and innovation, and boasts more than 13,000 lifesaving transplants over the past four decades. Raising support for this kind of work provides the opportunity to have a demonstrable impact on the lives of so many people facing cancer and other difficult illnesses.

CONNECTED
Situated in one of our nation’s most diverse and influential regions, City of Hope’s work inspires prominent individuals and families, as well as key foundations and corporations, to be involved with our mission.

ROBUST
Our fundraising program is diverse and evolving, with a unique national support network of corporate partners and business leaders, as well as deep relationships with individuals in communities both locally and across the country.

ADVANCEMENT
With a unique focus on engagement and innovation, leaders in our Office of Philanthropy and throughout City of Hope put an emphasis on career advancement and skill growth. We are aggressively recruiting dynamic and committed people to join our team and help lead our efforts to build a program that is a national model of excellence.

OFFICE OF PHILANTHROPY
VISION STATEMENT:
We will be known institutionally and nationally as a model of excellence among elite fundraising programs. Success will be achieved by building exceptional, long-term donor partnerships, and demonstrating that all levels of philanthropic support are leveraged to realize maximum impact for City of Hope’s mission. Holding to the highest standards of professional performance and conduct, our committed staff will function as a highly collaborative, efficient and creative team.

I JOINED THE OFFICE OF PHILANTHROPY because I believe in the strategic vision of the leadership team, and want to be a part of the amazing transformation that is currently taking place. Given my background and skill set in data analytics and research, I build systems that support staff, increase revenue and efficiencies, and move the organization closer to achieving its goal of becoming the “model of excellence among the most elite fundraising programs.”

NATHAN FAY
Associate Vice President, Prospect Development
The Office of Philanthropy is building a premier fundraising team with highly creative, committed and talented innovators. Our goal is to set the pace for excellence in the field of advancement and inspire philanthropists to champion our lifesaving mission.

Colleagues in the Office of Philanthropy work in a fast moving and dynamic team environment, collaborating closely with medical and scientific faculty and philanthropic partners across the country. Together we connect vision, leadership and philanthropic passion to help solve some of the world’s biggest challenges.

The Office of Philanthropy at City of Hope is led by Chief Philanthropy Officer Kristin Bertell, M.A., C.F.R.E. At full capacity, the team is composed of more than 140 professional and support staff at our main office in Southern California and field offices across the country.

The Office of Philanthropy is a comprehensive and robust fundraising program that encourages personal and professional performance at the highest individual and team levels, with exceptional opportunities for growth, learning and advancement. We are committed to maximizing team performance while fully leveraging individual strengths and giving everyone the opportunity to excel.

“WE ARE BUILDING SOMETHING INCREDIBLE. The same culture that drives our research and care, that special combination of urgency, excellence and collaboration, forms the foundation for our philanthropic efforts. I always tell our team that I don’t believe in following best practices - I believe in creating them. Our vision is to create something exceptional and impact more lives.”

KRISTIN BERTELL
Chief Philanthropy Officer
With its trend-setting metropolitan cities, urban and natural landscapes, sprawling beaches, fast growing economy and eclectic entertainment options, Southern California is an ideal location to create the ultimate work-life balance.

Southern California offers endless summers and some of the most beautiful natural playgrounds, with the ocean and mountain ranges right on your doorstep, offering outdoor opportunities to bike, hike and surf. In Los Angeles, the Entertainment Capital of the World, you can enjoy fine dining, glamorous nightclubs and all the big names in music and comedy. You can also tour the set of your favorite television show, explore the Hollywood Walk of Fame and have your very own celebrity sighting. Sports enthusiasts can root for the hometown favorite in baseball, basketball, football and hockey. If shopping is what you desire, there are stores that appeal to all types of shoppers and interests.

Whether you are starting your career or are a seasoned professional looking to relocate, SoCal offers a variety of housing options, from upscale townhomes to quaint communities with their own personalities. Your options are limitless.

Join our philanthropy team. Advance your passion in Southern California and change the world at City of Hope.

MOST NOTABLE ATTRACTIONS
- Beach communities like Malibu, Venice Beach and Santa Monica
- Disneyland and Disneyland California Adventure
- Knott’s Berry Farm
- Universal Studios Hollywood
- Aquarium of the Pacific
- Griffith Park and Observatory
- J. Paul Getty Museum
- Museum of Television and Radio
- Museum of Contemporary Art
- Los Angeles County Museum of Art
- Walt Disney Concert Hall
- Dorothy Chandler Pavilion
- Ahmanson Theatre and Mark Taper Forum
- Page Museum and La Brea Tar Pits
- El Pueblo de Los Angeles Historical Monument
- Beverly Hills and Rodeo Drive
- The Hollywood sign and the Hollywood Walk of Fame
- Big Bear Mountain
- Baseball with the Los Angeles Dodgers and Anaheim Angels
- Los Angeles Rams, football
- Basketball with the Los Angeles Lakers and Clippers
- Hockey with the Los Angeles Kings and Anaheim Ducks

“IT IS TRULY A PLEASURE to be a part of an organization that is home to high caliber scientific and medical research that is changing the landscape of medicine. I am inspired by this work, the culture of innovation, compassion, integrity and service, to be thoughtful in the execution of my tasks and collaboration with colleagues.”

SUZANNE LAWRENCE
Senior Director of Development, Foundations
“SINCE THE TIME I FIRST BECAME A PATIENT OF CITY OF HOPE, I knew it was where I was meant to be. Not only to save my life and receive the best treatment possible, but a calling. I’ve always been in awe of the staff at City of Hope. The way they go above and beyond for their patients inspired me. I am alive today because of groundbreaking research performed at City of Hope, and now as a member of the Office of Philanthropy working to support that research and being able to give back brings everything full circle. I am so thankful to be able to live, and so thankful to City of Hope.”

NICOLE SCHULZ
Office of Philanthropy intern and leukemia survivor

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Human Resources Manager, Philanthropy Strategic Partner
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