This Position Specification is intended to provide information about Loyola University Health System and the position of Vice President for Development. It is designed to assist qualified individuals in assessing their interest.
POSITION OVERVIEW

The Loyola University Health System (LUHS) enjoys an outstanding reputation for patient care, medical education, and research built over more than 35 of service to its communities. Now a part of the Trinity Health System and in partnership with the Loyola University Health Sciences Division, LUHS is focusing its considerable human, technological, and intellectual resources on serving its patients at its two sites – the Loyola University Medical Center in Maywood, IL and Gottlieb Memorial Hospital in Melrose Park, IL – and to ground-breaking research into the cause and prevention of disease.

Confident that this focus on patient care and research will be a compelling fund-raising case, LUHS now seeks a Vice President for Development to organize, to build, and to lead its efforts to generate philanthropic support. As the inaugural holder of this position, the vice president will have the unique opportunity to forge an organization, to establish protocols and procedures, and in particular to address prospects and funders on behalf of this exciting new construct. A particular aspect of this position is the opportunity to forge a strong, cooperative relationship with Loyola University Health Sciences Division, which consists of the Loyola University Strich School of Medicine, the Marcella Niehoff School of Nursing, and associated teaching and research centers, under the unified brand, Loyola Medicine.

The Vice President for Development will report to the President and Chief Executive Officer of the Loyola University Health System and will work closely on a day-to-day basis with LUHS’ Senior Vice President for Strategy and Planning. He or she will develop and execute protocols for the assignment and clearance of prospects and for the management and stewardship of gifts. Above all, the vice president will act as the senior fund raiser for LUHS, managing a portfolio of the organizations’ most capable prospects and enlisting the active involvement of both senior executives and leadership to maximize philanthropic support for priority needs.

To meet these challenging responsibilities, the vice president must be a development professional of considerable skill and experience, one with an extensive track record of leadership in a highly complex environment. Previous experience in healthcare philanthropy is highly desirable, as is leadership experience within a comprehensive campaign. Professionals who have built programs and acted successfully as agents of change will be particularly advantaged, as will those with the combination of intelligence, judgment, entrepreneurship, political savvy, tolerance for ambiguity, courage of convictions, and sense of humor needed to galvanize a widely-embraced vision for a new and complex organization.

The vision and energy of the vice president will not only create the structure but will establish the culture and the ethos for this exciting new approach to clinical care and academic medicine.

For information about how to make a nomination or to express personal interest in this opportunity, please see “Procedure for Candidacy” near the end of this document.
THE ORGANIZATION

Loyola University Health System

The Loyola University Health System is part of Trinity Health. For more on the genesis of this partnership, please see http://www.trinity-health.org/body.cfm?id=186&action=detail&ref=30.

Mission:

Loyola University Health System (LUHS) is committed to excellence in patient care and the education of health professionals. We believe that our Catholic heritage and Jesuit traditions of ethical behavior, academic distinction, and scientific research lead to new knowledge and advance our healing mission in the communities we serve. We believe that thoughtful stewardship, learning and constant reflection on experience improve all we do as we strive to provide the highest quality health care.

We believe in God’s presence in all our work. Through our care, concern, respect, and cooperation, we demonstrate this belief to our patients and families, our students and each other. To fulfill our mission we foster an environment that encourages innovation, embraces diversity, respects life, and values human dignity. We are committed to going beyond the treatment of disease. We also treat the human spirit.

Recognized Leader:

LUHS is a nationally recognized leader in providing health care and in conducting groundbreaking research to treat heart disease, cancer, organ transplantation, and neurological disorders. Loyola University Medical Center, located on a 61-acre campus in Maywood, IL, LUHS has provided skilled, compassionate care to patients for 35 years. Loyola was also an early adopter of the electronic medical record and uses the Epic EMR system wide in all its clinics, hospital and specialty areas (Cancer, Operating Room, etc). Amid all the technology and skill that is brought to bear against diseases, disorders and traumas, at Loyola, patients will find nurses, physicians and other clinical staff whose commitment to treating patients first as a person remains intact. This extra measure of compassion is a unique phenomenon and an integral part of the mission of LUHS. It is also part of our promise to the patient: to go beyond the illness to treat the whole person.

Facilities:

LUHS is an 801-licensed-bed institution that includes the Loyola University Medical Center campus (and its Loyola Outpatient Center, Cardinal Bernardin Cancer Center, the Ronald McDonald® Children's Hospital of Loyola, Burn/Trauma Center, and Center for Heart & Vascular Medicine, Oral Health Center and Behavioral Health Program) and the 36-acre Gottlieb Memorial Hospital campus in Melrose Park (including the Gottlieb Health & Fitness Center and the Marjorie G. Weinberg Cancer Care Center). The Maywood campus also includes Loyola University Health Sciences Division including its Stritch School of Medicine and the Marcella Niehoff School of Nursing and their research laboratories. The medical center has several construction projects underway today including a renovation of its emergency department,
The renovation of the inpatient cancer unit as well as a data center and new nursing school which will feature a center for collaborative learning for physicians and nurses using an advanced simulation center.

The Medical Center is a teaching, tertiary-care, 570 licensed-bed facility that includes a Level 1 trauma center and a Burn Center and it is served by an aeromedical program that flies patients from a range of 150 miles. LUHS employs more than 6,800 people and has 1,324 faculty members, 458 residents, 117 fellows, 552 medical students, 68 RN graduate faculty and 325 RN graduate students.

Network of Care:

In addition to the Maywood and Melrose Park campus locations, LUHS features an exclusive network of 28 specialty and primary care centers in Chicago’s western and southwestern suburbs including Burr Ridge, Elmhurst, Hickory Hills, Homer Glen, LaGrange Park, Maywood, Melrose Park, North Riverside, Oakbrook Terrace, Oak Park, Orland Park, Wheaton, Norridge, Elmwood Park, Schiller Park, River Grove, Chicago and River Forest.

In addition to the physician offices Loyola also offers an array of Specialty and Subspecialty services including the Loyola Aesthetics Center at Oakbrook Terrace North, Loyola Ambulatory Surgery at Oakbrook (LASCO), a joint venture with Surgical Care Affiliates, Loyola Center for Heart and Vascular Medicine in Park Ridge, the Loyola Center for Children's Health at Oakbrook Terrace North and the Loyola Center for Hearing in Woodridge. Loyola also operates a Dialysis Center in Maywood as well as Rehabilitation Centers in Maywood, Oakbrook Terrace, Hickory Hills, Burr Ridge and Homer Glen. In addition to basic Radiology at most locations, Loyola operates 2 Imaging Centers at Oakbrook Terrace North and Burr Ridge, A Sleep Center and Day Rehabilitation Program are also available at Burr Ridge. Loyola has also opened two immediate care centers in Homer Glen and Burr Ridge and is planning to open a third over the next year. LUHS also serves as co-owner-operator of RML Specialty Hospitals, which includes two long-term care facilities for ventilator-dependent patients in Hinsdale and Chicago, IL.

The ambulatory programs generate a 22% margin, with over 700,000 MD encounters each year, and manage over 900 FTEs. Patient Satisfaction as measured by Avatar is at the 75 percentile performance for overall satisfaction and likelihood to recommend. Loyola is voluntarily participating in the CG CAHPS surveys for primary and specialty care. The Primary Care network is a top performer within the BC/BS Managed care product and is readying for medical home designation. The primary and specialty care physicians have participated in the CMS pilot for GPRO/PQRI since 2009 and have received incentive payments for the participation. Loyola has attested to Meaningful use e-prescribing for 2 years, Medicaid eligible providers this year and are in the process of attesting to Medicare eligible providers.

Website: www.loyolahealth.org

Trinity Health

Trinity Health, one of the largest Catholic health systems in the United States, was formed in 2000 when the Holy Cross Health System merged with Mercy Health Services in a singular Mission – sharing the traditions of its founders, the Sisters of Mercy Regional Community of
Detroit and the Congregation of the Sister of the Holy Cross, Trinity Health is a faith-based organization — specifically a Catholic health care delivery system — devoted to a ministry of healing and hope and drawing on a rich and compassionate history extending beyond 140 years.

Based in Novi, Michigan, Trinity Health operates 47 acute-care hospitals, 401 outpatient facilities, 31 long-term care facilities, numerous home health and hospice programs, and senior services/housing operations in ten states. The health system employs 54,000 full-time equivalent associates and more than 10,800 physicians. As a not-for-profit health system, Trinity Health reinvests its profits back into the community through programs to serve the poor and uninsured, manage chronic conditions like diabetes, health education and promotion initiatives, and outreach for the elderly. In fiscal 2011, this included more than $453 million in such community benefits (excluding Loyola contributions).

Trinity Health has consistently reported positive operating results with $7.4 billion in unrestricted revenue, operating cash flow margin of 10 percent and operating margin of 3 percent reported in fiscal year ended June 30, 2011 (excluding the impact of Loyola). As of June 30, 2011, Trinity Health (excluding Loyola) had a strong balance sheet with $4.5 billion of investments (with an additional $3.7 billion in retirement programs) and related investment returns of 13.2 percent. Trinity Health also reported 246 days of cash, 44.6 days in accounts receivable and a debt-to-cash flow ratio of 3.53.

Strongly positioned in capital markets, Trinity Health is AA bond rated with a stable outlook from all three agencies on a $2.8 billion debt structure. The health system has a capital of budget of $800 million for fiscal year 2012.

Website:  www.trinity-health.org

Mission:

We serve together in Trinity Health, in the spirit of the Gospel, to heal body, mind, and spirit, to improve the health of our communities, and to steward the resources entrusted to us.

Vision:

Inspired by our Catholic faith tradition, Trinity Health will be distinguished by an unrelenting focus on clinical and service outcomes as we seek to create excellence in the care experience. Trinity Health will become the most trusted health partner for life.

The Vision focuses on a "trinity" of themes:

- A commitment to our founding purpose to strengthen Catholic health care
- An emphasis on providing a personal care experience in our Ministry Organizations
- The importance of building trusting relationships with all of our constituencies: patients, associates, physicians and communities

Core Values:
Respect - We value and esteem every human person because each and every one is created by God, in the image of God. Everyone, regardless of title or position, income, education or status, race, religion or ethnicity has a dignity that is sacred. We treasure and hold human life sacred from its simplest beginnings until its end.

Social Justice - In this age of globalization and instant communication, we more quickly recognize our common humanity. We recognize as well the great gaps in economy, health, education, and development among the peoples of this earth. Social justice commits us to the common good so that all may have their basic needs met. We recognize health and access to healthcare as a basic human right and seek to provide and advocate for it.

Compassion - People come to us when they are in need and in distress. In the spirit of Jesus, we recognize their need and seek to respond to it. We reach out to them in their pain, suffering, and care for them in body, mind, and spirit.

Care of the Poor and Underserved - God hears the cry of the poor and so, with respect and compassion, we seek out the poor and underserved as a special focus of our healthcare ministry. It is those without resources of their own who need us most. We seek to care not only for their immediate needs but also to change the structures that keep them in unhealthy environments and inhumane conditions.

Excellence - We are impatient to do better and hold ourselves accountable for continuous improvement in the services we offer.

Loyola Medicine

Loyola Medicine is the unified brand that presents the individual and combined efforts of the Loyola University Health System and the Loyola University Chicago Health Sciences Division (HSD) – including especially the Strich School of Medicine and the Marcella Niehoff School of Nursing – to interested publics. Now separate corporate entities, LUHS (part of the Trinity Health System) and the HSD are determined to work in close cooperation to leverage the history and reputation of the Loyola Medicine brand in service to clinical care, medical and nursing education, and research excellence. In FY 12, Loyola Medicine raised $9.1 million ($6.9M for LUMC and $2.2M for LUC research).

POSITION SUMMARY

The Vice President for Development is responsible for the leadership of all fund-raising programs for the Loyola University Health System and all associated entities. The vice president reports to President and Chief Executive Officer of the Loyola Health System and on a day-to-day basis works in close tandem with the System’s Senior Vice President of Strategy and Planning. He or she is responsible for building broad-based private support for all aspects of the Loyola University Health System through the building and management of a comprehensive program including annual giving, major and planned giving, corporate and foundation giving, gift processing and acknowledgement, and other fund-raising support operations such as donor
relations and stewardship. The Vice President ultimately will have management responsibility for a staff of approximately 12 and a budget of approximately $1.6 million.

The development operation of the Loyola University Health System is in essence a new entity. The first and most pressing responsibility of the founding Vice President will be to forge an operation that is operationally focused on philanthropic support of LUHS and at the same time highly collaborative with the fund-raising operation of the Loyola University Health Sciences Division. This effort will include not only policies and protocols but also the creation of a compelling and understandable case for the support of the wide array of the individual and collective needs of the two institutions. Finally, he or she will serve as the senior fund raiser for LUHS, managing a portfolio of the institution’s most promising prospects and most generous donors.

Responsibilities

- Develops and implements a comprehensive development program for LUHS that incorporates both capital and annual fund-raising but focuses development activities on securing major and planned gifts from individuals
- Builds strong and mutually beneficial relationships between the leadership of LUHS and external audiences such as donors, patients, and business and community leaders
- Establishes an operating plan that incorporates annual goals, objectives, and strategies for fund-raising programs in support of the agreed-upon priorities
- Implements the management and administrative infrastructure necessary to achieve development goals
- Collaborates with institutional leaders in defining fund-raising and other external relations priorities
- Actively manages a portfolio of major gift prospects and donors by personally participating in their cultivation, solicitation, and stewardship; assigns major gift prospects to professional staff
- Provides primary staff support to executive leaders, physicians, and key volunteers with regard to donor cultivation and solicitation
- Manages development staff, including establishing and communicating fund-raising goals, providing leadership on major gift cultivation and solicitation strategies, and providing regular performance evaluations
- Regularly evaluates programs and assesses progress toward goals; reports on results to the President and Chief Executive Officer of the Loyola University Health System. Works closely with the Vice President for Development of Loyola University to ensure that prospects and gifts are tracked appropriately, shared services are utilized in good faith, and the spirit of cooperation with the University is maintained.
• Represents LUHS at public functions and special events as appropriate

• Oversees the preparation of written proposals, case statements, endowment agreements, and other materials needed to secure major gifts

• Oversees the development of proposals to foundations and corporations in support of LUHS initiatives

• Ensures the cooperative participation of development officers in the organization’s prospect management and tracking system

• Maintains familiarity with important philanthropic issues related to medical education, research, and clinical care

• Acts as the philanthropic liaison to the both university’s and the health system’s development, legal, and financial offices, and oversees the process of gift agreements and documentation

• Ensures that all programs comply with LUHS policies and standards

• Accepts and executes other duties as assigned

**Candidate Qualifications**

The Loyola University Health System first and foremost needs a leader and a builder of programs to serve as its inaugural Vice President for Development. The Loyola University Health System (and its parent, Trinity Health) and the Loyola University Health Sciences Division (and its parent, Loyola University Chicago) are themselves large, complex organizations. Together, in a new corporate construct represented publicly under a single, unified brand, they represent a new, exciting, and challenging corporate entity of significant complexity. The Vice President must possess the intellect, maturity, judgment, political savvy, diplomacy, decisiveness, courage of convictions, tolerance for ambiguity, and sense of humor that typifies successful leaders in highly complex, highly aspiring organizations. A track record as a builder of programs and a manager of change is highly desirable.

Significant experience at the leadership level of a comprehensive and successful development program is required. To this end, the vice president will demonstrate at least seven years of progressively responsible management experience in a complex environment. Previous experience in healthcare philanthropy is desirable. A bachelor’s degree is required and advanced study is preferred. The Vice President will understand both the fundamental aspects of the modern development operation and the most sophisticated manifestations of those aspects, including the full range of development activity from annual funds to principal giving, from corporate and foundation relations to donor relations and stewardship, from volunteer management to advancement services.

The Vice President must resonate with the core values and mission of the Loyola University Health System. To this end, it is not required that the Vice President be Catholic, but he or she must demonstrate a strong personal connection with the mission and values of the
organization. Likewise, a track record demonstrating the ability to relate to the organizations’ core audiences – Midwestern, largely suburban – is necessary.

It should perhaps not go without saying that the Vice President will possess superior communications and relationship-building skills and experience. It is particularly critical that he or she be a strong collaborator, one dedicated to building consensus around plans and programs.

**EXPECTATIONS FOR LEADERSHIP**

The following are among the most pressing responsibilities and opportunities that the Vice President will address within the first two to three years of his or her tenure. They are presented in here in no particular order of priority.

**Build Infrastructure; Create a Plan**

The current fund-raising operation, including the staff, at LUHS derives from the process of separating the two institutions. As a result, the operation requires considerable attention as it creates the infrastructure necessary to undertake state-of-the-art development work. The existing staff must be appropriately deployed and its capacity must be augmented by strategic additions of people and expertise. Advancement services need immediate attention, especially as LUHS and the Health Sciences Division continue to work out issues over the control of the existing database of grateful patients, prospects, and donors. Policies and procedures must be developed; among these, well understood and widely respected protocols for prospect clearance and assignment will, naturally, be among the most important.

As the infrastructure is built, the Vice President will work with the leadership of LUHS, in coordination of the Oversight Committee to author a strategic plan for development. The fundamentals of that plan will build on the organization’s past success. Central to the plan will be true engagement with the medical staff, which to this point has not been successfully involved with development. The plan will be aided substantially by the existence of a grateful patient database, a history of fund-raising for clinical care at Loyola, and the enthusiasm of the health system board to increase significantly the intensity and the productivity of fund-raising for LUHS.

**Raise Money**

The Loyola University Health System’s philanthropic needs are considerable. Ultimately, the organization aspires to raise commitments approximating $20 million annually, and it seeks the infrastructure, personnel, and leadership capable of taking it to that level. The HSD is anxious to launch into a campaign that will focus in particular on needs in the area of basic research; the health system is less ready for such an effort. Both and each have significant needs, especially in terms of facilities to support teaching, patient care, and research.

While there is much to be done to create and to establish the credibility of the LUHS development program, fund-raising must not only continue but must be accelerated at the same time. The Vice President will immediately identify and engage with the key prospects that
require the most senior-level engagement with the organization and will ensure that they are being actively cultivated and moved toward solicitation. Donor relations is another immediate need, especially in light of the confusion attendant in the transition to separate corporate ownership. In short, development activity must be enhanced while the organization is at the same time coalescing.

**Express a Unified Brand**

Loyola Medicine is the single brand of two separate corporate entities that, until approximately one year ago, were united as a single organization. In 2011, Loyola University Chicago transferred its clinical medical enterprises – essentially, the Loyola University Hospital and associated clinical enterprises – to the Trinity Health System, essentially separating them from an ownership perspective from the educational enterprises of the former Loyola University Medical Center, principally the Strich School of Medicine and the Niehoff School of Nursing. The process of that separation is ongoing and, as one might expect, exceptionally complex. Among the agreements that attend this ongoing process is one that is central to the fund-raising operations of both entities – a dedication to presenting the combined entities in a unified brand to external audiences.

The entire concept of Loyola Medicine as a fund-raising entity is built on this approach. The Vice President will put that concept into practice by creating a case for support and by orienting his or her staff to express that case publicly in ways that emphasize the symbiosis of the two entities in support of clinical care, research, and education. Accomplishing this task will require close collaboration with the Loyola Medicine Development Oversight Committee, the senior leadership of both corporate entities (including Trinity Health and Loyola University Chicago), a strong and cooperative relationship with the chief development officer of the Health Sciences Division, and, importantly, the establishment of a tone and culture within the development staff that incentivizes and rewards collaboration and cooperation.

The overarching goal of Loyola Medicine from a donor relations perspective is to provide a simple, understandable, unified approach to prospects and donors that leverages the history and reputation of the brand in order to maximize philanthropic support. Competition and conflicts between and among programs and personnel are inevitable, particularly in the early stages of the new brand’s development as precedents are established and policies developed. That these growing pains and internal dynamics be kept apart from and invisible to prospects and donors is of the utmost importance and should be considered a primary responsibility of the new Vice President. He or she will be engaged by the leadership of both entities to adjudicate conflict, and in every case the intention of the donor will predominate any and all such decision-making.
PROCEDURE FOR CANDIDACY

Recruitment will continue until the position is filled. Nominations, expressions of interest, and applications (including a cover letter and resume) should be submitted via email to LUHSVP@wittkieffer.com.

Material that cannot be emailed may be sent to:

Vice President for Development
Loyola University Health System
c/o Witt/Kieffer
Attention: Dennis M. Barden/Amy N. Crutchfield
2015 Spring Road, Suite 510
Oak Brook, IL 60523

Confidential inquiries and questions concerning this search may be directed to Dennis M. Barden at (630) 575-6167 or to Amy N. Crutchfield at (630) 575-6130.

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