



# Job Description

Job Title Director of Foundation Operations Job Code: 2512		Reports To (Title) Foundation Executive Director	Creation / Revision Date Sept 2015 / Oct 2015
Dept Number 10-8319	Dept Name Foundation		
If this is a supervisory position, please complete these items			
Job Titles Reporting Directly to this Position: Grants and Research Officer Foundation Gift Coordinator Event Coordinator Communications Strategist		Responsible for the following: Annual Budget \$\$ \$3 Million	
		# FTE's 4	

A job description defines the job to be performed by a fully qualified employee who possesses the knowledge, skills, and experience required for the position. This is not designed to be an exhaustive list of all activities performed in the job.

This document should be reviewed and signed by the employee during department orientation. An electronic copy should be forwarded to the Human Resources department for future reference, and a signed copy should be forwarded to Human Resources and should be maintained in the manager's department education records.

<b>JOB SUMMARY: a brief description of the job.</b>
Oversee all Foundation operations to include budgeting, financial reporting, processing of gifts, bank deposits, endowment investments, database management, online giving, and prospect research. Build and maintain direct mail program. Oversee system wide grants. Assist with development of Foundation Strategic Plan, including the launch of WellStar's first comprehensive, system-wide capital campaign. Serve as staff liaison to Finance and Strategic Alignment Board Committees. Provide financial reports directly to the Foundation Board of Trustees.

<b>JOB QUALIFICATIONS: minimum requirements to be considered qualified to do the job.</b>
<p>Required <u>Minimum</u> Education: Bachelors degree required. Bachelors degree in accounting or finance preferred.</p> <p>Required <u>Minimum</u> Experience: Five years of experience in accounting and finance required. Three to five years of management experience required. Healthcare and/or Fundraising/Development experience preferred.</p> <p>Required <u>Minimum</u> Skills: Expert level experience with Microsoft Office, spreadsheet analysis, budget development, financial reporting, communication and negotiation skills are required. Proficiency in Raiser's Edge and familiarity with grant writing/research, licensing and contracts and legalities of gifts/investments preferred.</p>

<b>PHYSICAL DEMANDS AND WORKING CONDITIONS: typically found in this job.</b>
<p><i>Ability to push/pull/transport materials of at least 20 pounds. Frequent/routine operation of telephone and computer equipment in a typical office setting. Periodic travel between office sites</i> Check one to indicate exposure to blood, body fluid, or tissues: (double click box and select "checked")</p> <p><input type="checkbox"/> Category 1: This job poses the potential of occupational exposure in routine tasks performed.</p> <p><input type="checkbox"/> Category 2: This job may pose the potential of occupational exposure. Regular job tasks do not involve exposure, but the employee may have potential exposure in some tasks.</p> <p><input checked="" type="checkbox"/> Category 3: This job does not pose the potential of occupational exposure in any duties.</p>

**WELLSTAR CORE COMPETENCIES (apply to all WellStar Team Members):**

**Communication:** Communicates well both verbally and in writing, creates accurate and punctual reports, delivers presentations, shares information and ideas with others, has good listening skills.

**Customer Focus:** Builds customer confidence, is committed to increasing customer satisfaction, sets achievable customer expectations, assumes responsibility for solving customer problems, ensures commitments to customers are met, solicits opinions and ideas from customers, responds to internal customers.

**Integrity/Ethics:** Deals with others in a straightforward and honest manner, is accountable for actions, maintains confidentiality, supports company values, conveys good news and bad.

**Financial Stewardship:** Plans for and uses resources efficiently, always looks for ways to reduce costs,

**Dependability:** Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, meets attendance/punctuality requirements.

**Job Knowledge:** Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands company mission/values, keeps job knowledge current, is in command of critical issues.

**Problem Solving/Analysis:** Breaks down problems into smaller components, understands underlying issues, can simplify and process complex issues, understands the difference between critical details and unimportant facts.

**Teamwork:** Meets all team deadlines and responsibilities, listens to others and values opinions, helps team leader to meet goals, welcomes newcomers and promotes a team atmosphere.

**Safety/ Work Environment:** Promotes mutual respect, demonstrates consistent application of safety absolutes and the Safety First Program and keeps workplace clean and safe.

**Quality:** Is attentive to detail and accuracy, is committed to excellence, looks for improvements continuously, monitors quality levels, finds root cause of quality problems, owns/acts on quality problems.

<p><b>RESPONSIBILITIES, ROLES, AND FUNCTIONS: A set of functions that define the job's reason for existence. Not to be confused with core competencies. (TAB at the end to enter a new line)</b></p> <p>Break down each responsibility into 3 to 5 tasks/activities that make up the responsibility. In other words, show what the employee does in the job to accomplish the job's objectives.</p> <p>Provide the normal percentage of time spent on each overall responsibility. →</p>	<p>% of Time Spent</p> <p>Total 100%</p>
<p><b>1. Lead all financial operations for the Foundation.</b></p> <ul style="list-style-type: none"> <li>a. Oversee development of annual budget, all processing of gifts and monthly balancing with Finance.</li> <li>b. Prepare monthly financial reports and coordinate annual audit.</li> <li>c. Oversee endowment investments and coordinate Foundation Finance committee.</li> <li>d. Report to Board of Trustees on Foundation financials.</li> <li>e. Oversee all prospect research.</li> <li>f. Oversee all purchase orders and invoices.</li> <li>g. Track all operating expenses.</li> </ul>	<p>35%</p>
<p><b>2. Oversee Raiser's Edge database development and maintenance.</b></p> <ul style="list-style-type: none"> <li>a. Lead development of donor database to increase functionality and enhance fundraising capabilities.</li> <li>b. Establish database protocols and train staff. Oversee routine maintenance of database.</li> <li>c. Generate queries and reports for staff as needed.</li> <li>d. Coordinate with IS/IT to ensure needed technology for successful fundraising efforts.</li> <li>e. Negotiate annual licensing and maintenance contracts.</li> </ul>	<p>20%</p>
<p><b>3. Support prospect strategy, grant engagement, marketing, and events programs.</b></p> <ul style="list-style-type: none"> <li>a. Oversee Foundation website and online giving program.</li> <li>b. Oversee direct mail program.</li> </ul>	<p>15%</p>

c. Oversee all grant writing. d. Manage donor recognition and stewardship	
<b>4. Drive development of Foundation strategic plan.</b> a. Collaborate with Foundation Executive Director to develop and maintain Foundation strategic plan. b. Assist Director of Strategic and Annual Giving in supporting development team c. Work with Foundation Executive Director to build strong Foundation Board of Trustee engagement	15%
<b>5. Trust/Engagement (Mandatory Content)</b> a. Builds a culture of trust and engagement as reflected in the Great Place to Work Trust Index Survey at a direct report, workgroup and hospital/entity level. b. Holds leaders accountable for behaviors that create trust and engagement. c. Performs all duties and responsibilities of this position in a manner that reflects the values of WellStar. Maintains and strengthens relationships with physicians and assures their involvement in developing systems to assure the growth of the service and the cost effective delivery of quality patient care in a manner that fosters patient and employee satisfaction.	5%
<b>6. Results Oriented Leadership (Mandatory Content)</b> a. Sets challenging and productive goals for team. b. Holds team accountable for actions while providing leadership and motivation. c. Provides resources and support d. Uses checkpoints and data to track progress, setting up system and processes to measure results.	5%
<b>7. Collaboration and Partnership (Mandatory Content)</b> a. Works collaboratively and as a team member with hospital leadership. Partners with Human Resources to achieve desired organizational culture, staffing and workforce metrics. b. Fosters positive working relationships between staff and physicians across the Health System. c. Fosters a culture that focuses on patient satisfaction, safety, customer service, staff participation, collaboration, motivation, and effective communication.	5%

Printed Name: \_\_\_\_\_ Employee's Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Employee ID Number: \_\_\_\_\_

The employee's signature documents the opportunity to review and clarify the information outlined above.

Job Description	
Original Creation Date	9/2015
Revision Dates	10/2015
Final Approver(s)	Penny Morrison-Ross, Kim Menefee
Date Approved	10/28/2015
Education Requirement	Bachelors
Certification Requirements	(no minimum certification required)
License Requirements	(no minimum certification required)
Evidence-based Practice References	N/A
<i>This job description replaces all previous job descriptions for the same job code/job title.</i>	