



Hospital Foundation

DIRECTOR OF GIFT PLANNING
HOAG HOSPITAL FOUNDATION
Newport Beach, California

The Highest-Ranked Hospital in Orange County, Reaching Even Higher

THE SEARCH

Since 1952, [Hoag Hospital](#) (Hoag) has carried out its mission to serve the community by providing health care of the highest quality. Hoag is expanding its reach across Orange County, continuing to develop facilities and programs that advance treatment options, promote cutting-edge translational research, and invest in top-tier technology combined with holistic wellness offerings. Philanthropy is critical in increasing access to Hoag's expert, comprehensive care for more communities. At this exciting moment of expansion, Hoag Hospital Foundation (HHF) seeks an experienced and driven individual to serve as the director of gift planning.

Building upon Hoag's upward trajectory and the momentum of the current campaign, [Boldly Hoag](#), a \$300 million capital campaign to support the ambitious growth of Hoag's Irvine campus, the intentional investment in this role reflects the strategic importance to the foundation of enhancing and expanding Hoag's existing gift planning program. *Boldly Hoag* will bridge to a \$1 billion comprehensive campaign over the next ten years, and the director will play a strategic role in both campaigns. Reporting to the vice president of legal and executive director of gift planning, the director will have a specialized focus on qualifying planned giving prospects and will be a key partner to all HHF fundraising units, serving as a strategic advisor on planned gifts.

The director will personally cultivate a portfolio of planned gift donors and prospects through engagement, qualification, cultivation, solicitation, and stewardship. In addition, the director will market varied deferred and outright giving vehicles to numerous internal and external audiences and provide leadership and technical assistance to donors, volunteers, and foundation colleagues regarding the tax and financial aspects of charitable giving. The executive director of gift planning will mentor the director, making introductions to lawyers, accountants, and advisors in the region. In partnership with the

executive director, the director will engage this group of local advisors with quarterly meetings, expanding HHF's influence in the local gift planning network.

To achieve Hoag's ambitious goals, the director of gift planning must be a proactive, highly collaborative professional who excels at identifying, qualifying, cultivating, and soliciting planned giving prospects. The ideal candidate will possess a high degree of professional experience and knowledge of fundraising best practices within a large, complex, fast-paced organization. The director must possess superior communication and marketing skills to ensure effective messaging for various audiences and a high level of integrity and emotional intelligence to engage and partner with key internal and external constituents effectively. The ideal candidate will have five years of fundraising experience, an established track record of closing planned gifts, and progressive experience in successful development programs. A bachelor's degree is required, and a juris doctor is preferred.

Hoag Hospital Foundation has retained Rachel Ellenport of the national executive search firm, Isaacson, Miller, to assist in this important recruitment. Confidential inquiries, nominations, and applications should be directed to the search firm as indicated at the end of this document.

HOAG HOSPITAL FOUNDATION

Hoag Hospital Foundation, a separate 501(c)(3) corporation, is an integral partner in Hoag's mission to become a trusted and nationally recognized healthcare leader. Under the direction of an engaged volunteer Board of Directors, HHF conducts campaigns and programs that raise more than \$100 million in new gifts and pledges each year. Of the total annual contributions, about half come from realized and documented planned gifts. In September 2022, Hoag announced the largest gift in its history: [\\$106 million](#) from the estate of Audrey Steele Burnand. The gift will be used to significantly expand the hospital's world-class health care research and treatment capabilities.

Securing the philanthropic resources to fuel leading-edge research, superb and compassionate clinical care, and advanced training drives HHF, and each member of the 70+-person organization plays a key role in this important work. HHF is comprised of a talented and respected community of development professionals who take tremendous pride in the collaborative, supportive, and rewarding culture that they have diligently and intentionally created over the years.

As of December 2023, HHF's endowment stood at \$436 million. The foundation manages nearly 800 endowed funds. Hoag completed *Hoag Promise*—its first-ever, record-setting comprehensive campaign—in December 2020, securing over \$760 million against its initial \$627 million goal. Planning is underway for Hoag's next billion-dollar comprehensive campaign.

Additional information on HHF is available at hoaghospitalfoundation.org

Boldly Hoag Capital Campaign

A \$300 million capital campaign to expand Hoag's Irvine campus and redefine the future of health care, *Boldly Hoag* is engaging community members, organizations, and philanthropists throughout Orange County and beyond. Publicly launched in November 2022, early philanthropic support, including a \$50 million gift from the Sun Family Foundation, has inspired others to donate gifts of all sizes. Two recent gifts of \$1 million each—one from Pacific Life and one from the Ueberroth family, longstanding supporters of Hoag—are helping lead the campaign forward, transforming Hoag into a national destination for world-class care. More than new buildings, Hoag's expansion is about a deep commitment to delivering innovative, compassionate care. Three bold, interconnected initiatives are supported by *Boldly Hoag*: elevating the patient experience, recruiting and retaining top talent, and designing and building the future of health. The capital campaign is slated to conclude in 2025. For more information, please visit BoldlyHoag.org.

DIRECTOR OF GIFT PLANNING

The director of gift planning will report to the vice president of legal and executive director of gift planning and play a central role in developing the pipeline of support for planned gifts within a metrics-driven, research-based program. This role will support gift planning throughout Hoag's expanding footprint within Orange County. The director will enhance Hoag's existing gift planning program, with a particular focus on proactively identifying and qualifying new and existing planned gift prospects. In addition, the director will collaborate with the foundation's central marketing team to create marketing strategy and material specific to gift planning.

Major Functions and Responsibilities:

- Develop and actively manage a portfolio of approximately 75-100 planned giving prospects by identifying, qualifying, cultivating, and soliciting new planned giving prospects.
- Partner closely with the executive director of gift planning to develop and implement the foundation's planned gift strategy.
- Collaborate with clinical-based development staff to secure deferred and complex outright gifts and help train and mentor development officers in planned giving techniques and strategies.
- Cultivate relationships with local advisors and implement quarterly meetings to engage Hoag's gift planning advisory committee.
- Engage in the direction, implementation, evaluation, and management of innovative, individualized marketing plans and strategies for the cultivation and solicitation of planned giving prospects.
- Develop and present formal fundraising proposals, illustrations, transfer documents, bequest language, and other gift agreements to secure major outright and deferred gifts.
- Consult with donors' advisors to complete gift agreements and inform tax, legal, and financial

advisors of foundation policies for planned gifts. Support donors and their advisors in clarifying objectives and obtaining and reporting pertinent information. Utilize tax law concepts to prepare formal written gift proposals and other materials for use in donor cultivation and solicitation.

- Collaborate with the foundation's events department to ensure successful donor cultivation.

Qualifications and Experience:

- Five or more years of progressively responsible professional fundraising experience, preferably in health systems or higher education.
- A proven track record of success in personally qualifying, cultivating, soliciting, and stewarding planned gifts.
- A clear understanding of philanthropy and philanthropic practice, particularly the unique individual relationships required to secure planned gifts.
- A deep appreciation for the history, mission, achievements, and aspirations of Hoag and the foundation; the ability to effectively articulate the vision for the future to a diverse audience.
- A genuine passion and energy for contributing to the growth and evolution of a development program in a rapidly changing environment; the ability to work effectively with a broad range of constituents – providing strong support, inspiring them to action, and making the experience rewarding.
- Superior interpersonal and communication skills, both oral and written. Must be able to communicate effectively to a large and diverse audience, including senior administration, physician partners, trustees, donors, prospects, colleagues, staff, and other hospital employees.
- Self-directed, self-motivated, grounded, and collaborative leader who can facilitate change. A creative problem solver, flexible, and adaptable to changing priorities.
- Willingness to explore new partnerships and ways to collaborate with others.
- A creative approach to problem-solving, and strong critical thinking and analytical skills. A high level of energy, self-assuredness, optimism, personal resilience, and the ability to function at peak levels in a high-expectation environment are essential.
- Honesty, integrity, enthusiasm, perspective, and a sense of humor.
- Strong commitment to the mission, vision, and values of Hoag Hospital.
- A bachelor's degree is required. Juris doctor preferred.

LOCATION

Hoag Hospital has locations in Newport Beach and Irvine, both of which are in the heart of Orange County. The Hoag Hospital Foundation's main offices are located in the Coufos Family Center for Philanthropy in Newport Beach, less than an hour from Los Angeles International Airport (LAX) and downtown Los Angeles. The Irvine campus is roughly 80 minutes from both LAX and downtown. Hoag enjoys the best of what Southern California has to offer: beaches, mountains, deserts, and a broad variety of cultural,

entertainment, and intellectual activities. To learn more about Newport Beach, please click [here](#). For more information about Irvine, please click [here](#). This position is in person five days per week and will primarily be based in Hoag's Newport Beach campus.

COMPENSATION

The pay range for this position is \$114,192 – \$160,617. Hoag Hospital Foundation offers excellent benefits, including medical, dental, and vision insurance, sick and vacation time, retirement savings plans, and access to various health, wellness, and professional development initiatives. Final salary offers are based on specific candidate qualifications and experiences and in support of equitable and consistent pay at the institution. This role is eligible for an annual incentive bonus, and a signing bonus may be available within department guidelines.

TO APPLY

Rachel Ellenport is leading this search with Bryce Ervin, Maureen Perry, and Rebecca Lyons. For more information, to submit a nomination, or to apply for this role, please visit:

<https://www.imsearch.com/open-searches/hoag-hospital-foundation/director-gift-planning>

Hoag Hospital Foundation does not discriminate in its employment policies and practices on the basis of factors such as race, sex, sexual orientation, gender identity, gender expression, age, color, religion, national origin, disability, or veteran status. Hoag complies with federal and state legislation and regulations regarding non-discrimination.

ADDENDUM

Leadership

Lyddy Lewis

Vice President of Development, Major Gifts, Hoag Hospital Foundation

Lyddy Lewis started her philanthropy career in food banking, pursuing a passion for serving others that has carried her into roles where she has successfully fostered fruitful relationships, raised major funds, and led teams to do the same.

In her current role as vice president of development, Lewis directs and manages fundraising for Hoag Hospital Foundation, overseeing a dynamic team based in Newport Beach and Irvine. She develops programs and activities for major gifts, annual giving, and gift planning. She began her career with the foundation as executive director of major gifts, where for nearly two years she was instrumental in optimizing best practices for donor qualifications and setting the direction of fundraising for clinical initiatives, including the ones responding to COVID-19.

Lewis was previously at the American Red Cross in North Texas, where she was senior director of major gifts and developed the top performing Individual & Foundation Giving team in the nation, exceeding revenue goals for five consecutive years. She maintained a portfolio of top tier major donors, prospects, and Fortune 500 corporate partners, developing key relationships across the region's 121 counties. She led multiple crisis response fundraising efforts on record-breaking disaster operations, both on the regional as well as the national scale. As interim chief development officer in the major markets of Dallas-Fort Worth and Houston, Lewis has experience forecasting, managing metrics and implementing a strategic vision in collaboration with executive leadership teams. She was responsible for the most prestigious major giving society within the American Red Cross network and developed the largest branch of the Tiffany Circle Society of Women Leaders from a pilot to an established program. Also, during her time at the American Red Cross, she was recognized as a Top Performing Leader by receiving top scores from her direct reports for employee engagement, performance enablement, and manager effectiveness.

Lewis is dedicated to developing a learning culture in which colleagues enhance their skills while aiming to achieve individual and organization goals.

Julie Heggeness, JD, CSPG, TEP

Vice President of Legal, Executive Director of Gift Planning, Hoag Hospital Foundation

Julie Heggeness is responsible for assisting individuals accomplish their financial, tax, estate, and philanthropic goals through charitable tax-wise planning. She provides a resource to assist donors and their advisors on the best methods of optimizing and minimizing income and estate taxation.

Heggeness graduated from the University of Southern California with a Bachelor's degree in Journalism and then attended Western State University School of Law, where she obtained her Juris Doctor. In 2000, Heggeness became a Certified Specialist in Planned Giving from the American Institute of Philanthropic Studies and is a member of the Society of Trust and Estate Planners.

Heggeness was recently presented with the Long Beach Business Journal's Business Woman of the Year Award. She serves as president of the Orange County Estate Planning and Trust Council. Heggeness recently was the Chair of the City of Long Beach Parks and Recreation Board and served as a member of the City of Long Beach Redevelopment Agency Board. She is a past board member of Orange County Partnership for Philanthropic Planning and is a past president of the Orange County Planned Giving Round Table. Heggeness also served as a member of the national board of the Partnership for Philanthropic Planners. She is past president of Women Lawyers of Long Beach, and is also a member-at-large of the Long Beach, Los Angeles County, and American Bar Associations. Heggeness was a member of the board of Camp Fire USA. She is a graduate of the Leadership Long Beach Class of 2003. Heggeness has served as a member of the Nominating Committee for the National Committee on Planned Giving and has been an NCPG Delegate. She is a past member of CAMEO, the professional auxiliary of the Assistance League of Long Beach. She is also a past president of the Estate Planning and Trust Council of Long Beach.

Heggeness frequently makes presentations on estate planning to seniors, community groups and professional associations as well as continuing education courses to attorneys, certified public accountants, and financial planners.