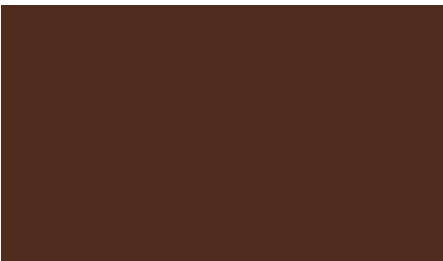
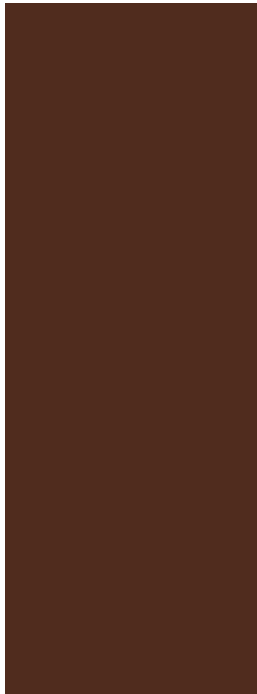
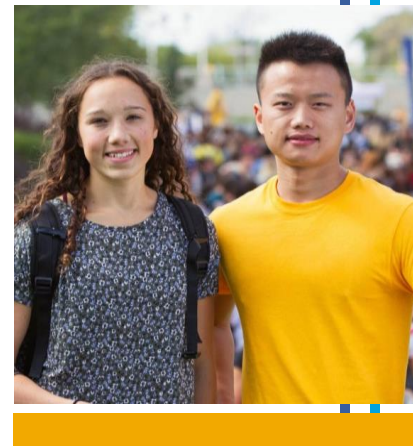




University  
of Manitoba



Position Brief

Director, Gift Planning





University  
of Manitoba

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### FOR MORE INFORMATION

KCI (Ketchum Canada Inc.) has been retained to conduct this leadership search on behalf of The University of Manitoba. For more information about this opportunity, please contact, Sylvie Battisti, Vice President, KCI Search + Talent by email at [UofMDGP@kcitalent.com](mailto:UofMDGP@kcitalent.com)

Interested candidates are invited to send a resume and letter of interest to the email address listed above by **April 14, 2022**

*All inquiries and applications will be held in strict confidence.*

*The University of Manitoba is strongly committed to equity and diversity within its community and especially welcomes applications from women, racialized persons, Indigenous peoples, persons with disabilities, persons of all sexual and gender identities, and others who may contribute to the further diversification of ideas. If you require accommodation supports during the recruitment process, please contact [UM.Accommodation@umanitoba.ca](mailto:UM.Accommodation@umanitoba.ca) or 204-474-7195. Please note this contact information is for accommodation reasons only. Application materials, including letters of reference, will be handled in accordance with the protection of privacy provisions of "The Freedom of Information and Protection of Privacy" (Manitoba). Please note that curriculum vitae will be provided to participating members of the search process.*

*The University of Manitoba requires all faculty, staff, students and visitors aged 12 and older to be fully vaccinated against COVID-19. UM wants to ensure our campuses are as safe as possible for our community and to allow us to return to as much in-person activity as we can, as quickly and safely as we can. Only those who have submitted proof of vaccination or have an approved medical or religious exemption, are allowed on campus. All UM staff are required to submit proof of COVID-19 vaccination, even if you are working remotely.*

**Please note that the salary range for this position is \$95,000 to \$128,000 with a comprehensive benefits package.**





## Director, Gift Planning University of Manitoba

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### THE OPPORTUNITY

The University of Manitoba is seeking a **Director, Gift Planning** to play a pivotal role during this exciting time. Reporting to the Associate Vice-President, Donor Relations, the Director, Gift Planning is responsible for the overall management of the planned giving program at the University of Manitoba, providing high-level expertise, strategic direction and facilitation in the development and implementation of a leading gift planning program designed to maximize long-term financial support for the university. Activities will increase visibility, enhance reputation, and support the university's strategic goals.

The incumbent works closely with other senior Donor Relations staff, including the Associate Vice-President, Donor Relations; Senior Director, Principal Gifts; Senior Directors and Directors in all faculties; Annual Giving; Advancement Services; and Stewardship with the goal of ensuring a strategic approach to securing legacy gifts to the University of Manitoba. The Director currently manages 1.5 direct reports (a Gift Planning Officer and a .5 Gift Planning Assistant) and collaborates with the broader advancement team to secure new legacy commitments and/or current gifts of complex assets as well as to steward long-term funding relationships. The Director ensures the building of the pipeline for future support and raises awareness of legacy giving within the UM community. Recognizing the importance of structuring tailored giving opportunities to major and principal gifts donors, the Director participates in major and principal gift strategies where appropriate and demonstrates leadership in securing resources for our university.

Externally, the Director, Gift Planning interacts with current and potential donors and supporters. They will personally manage a portfolio of approximately 215 donors and potential donors and oversee gift planning strategies for direct reports as well as the Donor Relations team more broadly. The Gift Planning program secures, on average, 30 new expectancies per year, and between \$3 - \$4M is generated through realized bequests annually.

The Director, Gift Planning is a senior member of a dynamic Donor Relations team that includes colleagues based in Faculties and at the central Donor Relations office.

This position will be based at the Donor Relations Office at the University's Fort Garry Campus in Winnipeg, with some flexibility for occasional remote work.

## ABOUT UNIVERSITY OF MANITOBA

Since 1877, the University of Manitoba (UM) has been driving discovery and inspiring minds through innovative teaching and research excellence. Proudly located in the heart of Canada, UM has a strong and engaged community of students, faculty, staff, alumni, donors, and community partners.



With two main campuses in Winnipeg and over 100 programs across multiple faculties, schools, and colleges, UM offers more learning, teaching, and research opportunities than any other post-secondary institution in the province. Most of the academic departments have graduate studies leading to master's or doctoral degrees. For this academic year, UM has more than 31,000 undergraduate and graduate students, with more than 21.9% international students representing 115 countries.

**In recent years, the University of Manitoba is pleased to have been awarded Manitoba's Top Employers Award and Canada's Best Diversity Employer Award.**

As one of the country's top research institutions and the only research-intensive university in the province, UM researchers are making contributions that have a global impact. UM ranks 17th among Canada's top 50 research universities for attracting research grants and contracts.

The University is home to more than 50 research centres, institutes, and shared facilities that promote the exchange of ideas and provide collaborative research environments that stimulate multidisciplinary research and development. In 2019/20 UM research received \$192.2 million in sponsored research income. UM currently has 85 endowed and sponsored research chairs, including an allocation of 50 Canada Research Chairs, a Senior Canada 150 Research Chair, a Canada Excellence Research Chair, and a Canada Excellence Research Chair Laureate.

Along with the Fort Garry campus as its central hub, the University of Manitoba operates three other major locations: the downtown Bannatyne Campus, the James W. Burns Executive Education Centre, and the William Norrie Centre. Additionally, the university also administers its French-language affiliate, Université de Saint-Boniface in the Saint Boniface ward of Winnipeg.

The University of Manitoba is home to the National Centre for Truth and Reconciliation, which officially opened its doors in 2015. The Centre is dedicated to preserving the truth of Residential Schools and advancing reconciliation. The University also has one of the largest Indigenous student populations in Canada, with more than 2,600 First Nations, Métis, and Inuit students, including more than 250 graduate students. Some of the country's brightest stars in Indigenous research are at the University of Manitoba, advancing the University's commitment to embed Indigenous perspectives into learning, discovery and engagement and helping to create pathways to Indigenous knowledge and achievement.

Many of the world's great minds have been part of the University of Manitoba. Twenty-six UM doctoral students have received a Vanier Canada Graduate Scholarship and 99 students have been awarded the prestigious Rhodes Scholarship—more than any other university in Western Canada. Nine Order of

Manitoba recipients with UM connections received the province’s highest honour in 2020. In 2019, four members of the UM community joined the prestigious ranks of the Order of Canada.

Across the globe, in 139 countries, there are over 181,000 University of Manitoba alumni carving their own paths. The Distinguished Alumni Awards have honoured 27 outstanding alumni, joined by more than 1,600 event guests. Since 2015, UM has hosted over 200 class reunions and welcomed more than 4,000 alumni and community members back to campus for celebrations.

Philanthropic support affects the lives of UM students in meaningful ways and fuels research that shapes Manitoba, our nation, and the world. In 2021-2022 outright gifts and new pledges to the University totaled \$61.5 million. Donors have helped grow the University of Manitoba endowment fund into one of the largest of its kind, with returns among the highest of all Canadian universities. Our graduates give back to their alma mater and more than 23,000 alumni have shown their support to the University’s most recent record-breaking Front and Centre campaign.

**The University of Manitoba’s Front and Centre Campaign**



The University of Manitoba’s Front and Centre campaign was concluded in Spring 2020 with 62,075 donors from 48 countries coming together to raise \$626,260,909, surpassing the campaign’s initial \$500 million goal and making it the largest philanthropic endeavour in Manitoba’s history. One in five alumni were donors to the campaign and more than \$5.9 million was given by faculty, staff, and retirees.

Gifts will support 702 new scholarships and bursaries for students; 21 research chairs and professorships established and enhanced to inspire teaching and learning; and 37 building upgrades to create an outstanding educational environment. In addition, over 331 estate gifts were pledged for UM’s future. The campaign also helped to build seven new spaces that change the footprint of the University such as the Active Living Centre, the Stanley Pauley Engineering Building, Taché Arts Complex (Desautels Concert Hall & Rehearsal Building), Campus Children’s Centre, Churchill Marine Observatory and Dairy Farmers of Manitoba Discovery and Learning Centre. More than \$252.1 million was designated by donors for research excellence, including the support of UM researchers on the front lines of developing vaccines or antivirals to mediate the COVID-19 pandemic.

**ADDITIONAL INFORMATION**

- [University of Manitoba](#)
- [About UM](#)
- [Facts and Figures](#)
- [2021 Annual Report](#)
- [Board of Governors](#)

- [UM Strategic Plan](#)
- [2021 Gratitude Report](#)
- [Front and Centre Campaign](#)
- [Community Giving](#)
- [UM Alumni Community](#)

## KEY DUTIES & RESPONSIBILITIES

### Direct Fundraising (40%)

- Develops and implements a prospect identification, cultivation, solicitation and recognition program to attract planned gift prospects, secure gifts and retain donors.
- Designs and implements effective solicitation strategies and manages donor portfolio in a way that enhances continued and increased support to the University.
- In collaboration with colleagues in Stewardship, plans and directs the stewardship program of upwards of 400 living and 300 deceased planned giving donors' families per year, including hosting a major annual luncheon, and other events and communications throughout the year.
- Prepares and explains financial and tax illustrations of planned gifts for prospects and donors;
- Writes persuasive, appropriate letters and proposals for prospects as required and works with the President, Vice-Presidents and senior university administrators, Deans and Donor Relations Staff to develop legacy proposals and strategies for individual prospects and donors.
- Ensures relationships with donors and potential donors are tracked appropriately in Raiser's Edge.
- Collaborates with Treasury Services, the University lawyer and/or lawyer of record to ensure timely administration of all estates, deferred and outright gifts, and advises and manages estates in which conflicts or legal challenges arise.
- Works with executors, estate solicitors, lawyers, other professional advisors and donor families to ensure the timely administration of all deferred and outright gifts.
- Represents the University of Manitoba to external constituencies and facilitates relationships between individuals, foundations, and key members of the University, leading to planned gifts.

### Team and Program Leadership (35%)

- Strategically leads the centralized Gift Planning program for the entire University.
- Independently recruits, mentors, leads, coaches, evaluates, and disciplines staff within the Gift Planning team.
- Acts as the University specialist on all matters relating to planned giving, including tax-wise and legal giving strategies;
- Integrates gift planning strategies within the overall strategic advancement plan of the University, the Faculties, External Relations, and Donor Relations.
- Directs a regular moves management process for all prospects and donors in the planned giving program and ensures individual strategies are developed and followed for each individual.
- Directs the strategic development of marketing and communications materials to support the work of the planned giving program.
- Implements a marketing program to enhance the understanding of planned giving among donors, prospective donors and professional advisors (ie: lawyers, accountants, trust officers, life underwriters, financial planners, etc.) with the goal of increasing deferred gifts to the University and facilitating stewardship and engagement of long-term university supporters.
- Trains and educates staff within Donor Relations, as well as Deans, Volunteers, and Senior Administrators to promote planned giving opportunities and integrate the concepts into the university's culture of philanthropy.
- Advises, trains, coaches and mentors Deans, President and Vice-Presidents, Senior Administrators, Volunteers, Major Gift and Donor Relations Officers in the use of planned giving strategies and on donor calls with prospective individuals.
- Provides information to professional advisors, lawyers, accountants, brokers, agents and financial planners to assist them with their clients.
- Ensures policies and procedures are in place to track and qualify prospects and record and report all actions, along with current and deferred gifts.
- Advises on university policy and procedure changes as they relate to changes in Federal legislation on charitable giving and maintains membership and/or contact with relevant professional associations, other universities and government bodies.

- Provide planned giving staff with appropriate opportunities for ongoing professional development, including active development of skills through in-service, on-campus and external educational programs.
- Oversees Gift Planning budget, approving and monitoring all program expenditures and conducting regular analysis and recommendations for resource increases/decreases.

### **Strategic Planning (25%)**

- Develops and implements a strategic gift planning plan as part of the annual and multi-year fundraising plans.
- Evaluates the success and efficiency of the strategic and modifies as needed to meet the objectives of the plan.
- Identifies priority segments for gift planning prospecting.
- Works closely with the Associate VP, Donor Relations, Senior Director, Principal Gifts, Director, and Major Gifts to identify prospects, develop strategy, and ultimately secure long-term support for the University of Manitoba.

## **QUALIFICATIONS & COMPETENCIES**

### **Experience:**

- A minimum of five years' experience fundraising within a post secondary institution, health care setting or other complex organization; preferably in the area of planned giving and/or relevant legal or financial sectors.
- Proven success in staff leadership with the ability to inspire, motivate and coach professional fundraisers.
- Demonstrated understanding of and experience in planned giving, annual giving, major gifts and a philanthropic campaign environment.
- Experience with public speaking and making presentations is required.
- Experience working with lawyers/accountants and financial planners in a corporate environment is an asset.
- A University degree required, preferably in a related field.
- CFRE Designation and CAGP training are assets.

### **Skills:**

- Ability to develop cooperative and mutually beneficial relationships with donors and other stakeholders.
- Ability to demonstrate discretion and sensitivity in handling confidential information.
- Ability to provide coaching and performance management to staff.
- Ability to create professional development plans for staff that aligns with the strategic goals of the department.
- Ability to develop strategic plans that incorporate the overall vision into short-term and long-term goals, anticipating challenges and identifying opportunities.
- Ability to communicate concisely and professionally, both written and verbal as well as in large and small group presentations.
- Ability to manage resources effectively including time, finances and human resources.
- Ability to understand complex legal and financial processes, including tax treatments of various charitable gift arrangements.
- Ability to manage a busy workload with a high degree of detail, individualized services and complexity required.

The position requires some travel. A valid driver's license and access to an automobile is essential.

## LEADERSHIP BIOGRAPHIES



**Stephanie Levene**  
**Associate Vice-President, Donor Relations**

With nearly 20 years of experience in the philanthropic sector, Stephanie is continually inspired by the generosity of donors, the power of community, and the dedication of her colleagues. Stephanie joined the University of Manitoba in November 2011 and became Associate Vice-President ( Donor Relations) in 2013. Stephanie leads a team of 45 professionals focused on inspiring deep and long-term relationships with alumni and donors to secure funding, talent, and advocacy.

Before joining the University of Manitoba, Stephanie spent eight years at United Way, including five years as Campaign Director. Stephanie worked in close partnership with the campaign chairs, cabinet, and campaign volunteers.

Stephanie earned a Bachelor of Arts (Psychology and Sociology), a Bachelor of Commerce (Hons.) in Marketing and Human Resources, and an MBA from the University of Manitoba. She has also participated in several leadership development programs and facilitated strategic planning sessions for United Ways in southern Ontario. Stephanie and her husband Mike are parents to two young boys, John and Jacob.



**Vanessa Koldingnes**  
**Interim Vice-President (External), University of Manitoba**

Vanessa Koldingnes is Interim Vice-President (External) at the University of Manitoba. Her previous leadership experience at the University of Manitoba includes a range of roles within the External Relations portfolio, most recently serving as Acting Vice-President (External). Ms. Koldingnes previously served as Acting Associate Vice-President (Donor Relations) and Director, Office of the Vice-President (External).

She joined the University of Manitoba in Donor Relations in 2012 and has extensive expertise in major gifts, faculty relations, alumni engagement and stewardship. Ms. Koldingnes earned a Bachelor of Arts from the University of Winnipeg and a Master of Business Administration from the University of Manitoba. Prior to joining the University of Manitoba, she held a number of fundraising leadership roles at national and international philanthropic organizations.



## LIVING IN WINNIPEG, MANITOBA

Known for its friendly and welcoming spirit, Winnipeg is a diverse, multicultural city with a rich and varied history. An Indigenous trading centre prior to the arrival of the Europeans, Winnipeg was at the heart of the country's fur trade and instrumental in developing Canada's gateway to the west. Home to a grain exchange that once rivaled the largest markets in the world, Winnipeg's architecture and neighbourhoods reflect the profound character of this prairie city.

Winnipeg is the capital and largest city of Manitoba being home to over 815,000, close to 60 per cent of Manitoba's population.



Over the last decades, Winnipeg has developed into a cosmopolitan city complete with top-notch restaurants, stylish boutiques, exciting attractions and an arts and culture scene that bursts with talent and originality. Its cultural organizations include Manitoba Theatre Centre, Manitoba Opera, the Royal Winnipeg Ballet, Winnipeg Symphony Orchestra, Manitoba Museum, and Winnipeg Art Gallery. Some of the city's popular festivals are the Festival du Voyageur, the Winnipeg

Folk Festival, the Winnipeg Jazz Festival, the Winnipeg Fringe Theatre Festival, Folklorama, and WSO New Music Festival.

Its economy includes finance, manufacturing, food and beverage production, culture, retail, and tourism sectors. Located at the confluence of the historic Red and Assiniboine Rivers, the city offers one-hour access to cabin country, beautiful golf courses, three professional sports teams and a vibrant arts community, including world-class opera, theatre, and ballet. A city known for its love of sports, it prides itself in its professional teams including the Winnipeg Blue Bombers (football), the Winnipeg Jets (hockey), and the Winnipeg Goldeyes (baseball).

Winnipeg's universities include the University of Manitoba, the University of Winnipeg, Canadian Mennonite University and University of St. Boniface, the oldest post-secondary educational institution in Western Canada.

Though real estate prices in Winnipeg have been on the rise in recent years – much like the rest of Canada – the increased prices have been driven by normal supply and demand, not by speculative inflation. For that reason, purchasing a home remains an affordable and achievable option. The average home in Winnipeg in 2020 was priced at \$302,339 – approximately 43 per cent less expensive when compared to the Canadian average. Winnipeggers also enjoy low transportation costs and have the shortest commutes of any major metropolitan city in Canada. From the heart of the city, nearly any part of Winnipeg can be reached in little more than a 20-minute drive.

Thanks to its northern location, Winnipeg residents enjoy sunshine over 315 days a year. In winter, temperatures average -12.9 degrees Celsius, and hot and dry summer days bring temperatures above 25 degrees Celsius. Typical summer evenings are pleasantly cool.



For more information, including introductory videos and an overview of the local economy/quality of life and lifestyle, see: <https://www.liveinwinnipeg.com/live-here/lifestyle>.

# ORGANIZATIONAL CHART

