

## **DIRECTOR, MAJOR & PLANNED GIFTS**

### **Revenue Development | Location: Quebec, Montreal**



#### **What We Do:**

Arthritis Society Canada is on a mission to fight the fire of arthritis with the fire of research, innovation, advocacy and information and support. That's because arthritis robs six million Canadians of their mobility, mental and physical well-being, and in some cases, their livelihood. It is Canada's most common chronic condition, and there is no cure.



#### **Why Join Us:**

A career with us is more than just a job. It's an opportunity to use your talents to push back against the devastation of arthritis. Fighting the fire of arthritis gives meaning to our work, incites collective action and drives us to excellence in all we do. Our bold and ambitious strategic plan, Accelerating Impact, is propelling our work to create transformational change. We are united, transformative and impactful culture. Our people are essential to our efforts, and we will empower you to be successful in your role. We are honoured to be a 2022 Canada's Most Admired™ Corporate Cultures winner, and proud to be accredited under Imagine Canada's Standards Program.



#### **Our Revenue Development Team:**

Our revenue development team is made up of talented fundraising professionals across Canada, in the areas of major giving, direct response, annual giving and corporate, who work closely with our community of generous loyal donors to turn shared visions, passions and interests into meaningful impact in fighting the fire of arthritis. We are a national charity with local impact, and the donation from these individuals makes a difference for people living with arthritis in every province.



#### **Purpose of Role:**

Reporting to the Vice President, Eastern Canada, and working part of the broader nationwide planned giving revenue development team, the Director, Major & Planned Gifts is accountable for securing and maintaining major giving revenue in Quebec, as well as planned giving revenue in both Quebec and the Atlantic provinces, to support the mission of Arthritis Society Canada.

This seasoned professional will build a robust, qualified donor pipeline and establish and maintain long-term relationships with a portfolio of current and potential corporate, family foundations and individual donors. The Director will be the lead relationship builder with 100-plus major giving donors/prospects in Quebec and will be accountable for building and managing the Quebec/Atlantic planned giving program.

The Director will be responsible for the identification, prospect research, cultivation, solicitation, and stewardship of major gift donors, and planned gifts donors as well as other stakeholders. They will manage a pipeline of identified planned giving prospects and will solicit prospects regularly with a goal to move them from interested to confirmed planned giving donors; and build relationships with a network of planned giving

professionals for advisory purposes. As an essential member of the development team, the Director will help to implement and deliver Arthritis Society Canada's five (5)-year strategic revenue goals.



## Key Accountabilities:

### **Major Gifts: Corporate, Individual and Family Foundations (75%)**

- With a keen focus on major gift donors, (corporate, individual and family foundations), builds strong, robust, values-based relationships with a pool of current and identified donors/prospects in Quebec (+ nationwide, as needed) to meet organizational, departmental and individual targets.
- Works closely with Vice President and full revenue development team to manage a pipeline of Quebec based donor prospects, as part of a nationwide "prospect coordination & progress" system.
- Researches and identifies current and potential major gift prospects to identify giving potential, alignments and targeted approaches for support.
- Manages assigned donor pool to ensure all donors receive appropriate stewardship and recognition to ensure continued engagement.
- Builds and maintains the major gift donor pipeline (100+ Quebec donors), including database tracking, ensuring that all contacts with donor and prospective donors are tracked and recorded accordingly in the Raiser's Edge database.
- Manages the preparation of letters of intent, applications and/or proposal overviews, full proposals, presentations, stewardship reports, needed to fulfill the complete donor cycle of their pipeline.
- Tracks, monitors, and achieves key goals, metrics and deliverables, as set by the Vice President.
- Where appropriate, enlists the strategic support of fundraising volunteers to assist with asks and donor engagement.

### **Planned Giving: Quebec/Atlantic Estate Administration and other Planned Giving Tasks (25%)**

- Sets the Quebec/Atlantic annual planned giving plan and budget, with final approval from the Vice President and Director, Planned Giving.
- Manages and implements Arthritis Society Canada's planned giving program in Quebec/Atlantic, including current donor cultivation and stewardship, as well as generating significant new opportunities for planned giving (and other revenue programs as appropriate) by leveraging both Arthritis Society Canada's existing donor database, bi-annual planned giving survey, planned giving scoring as well as the other existing planned giving lead generation activities.
- Builds and manages a pipeline of identified planned giving prospects, actively soliciting these prospects to confirm new planned giving commitments and or confirmations annually. (Maintains, enhances and develops these relationships)
- Aligned with the full PG team, inputs, manages and maintains documentation/data related to planned giving donor meetings and requests within Raisers Edge.
- Updates and maintains current and accurate planned giving donor information in Raiser's Edge database, and regularly reconcile the monthly planned giving tracking report, ensuring all planned giving information for is accurate.
- Independently reviews documentation received for Quebec/Atlantic bequest and estate gifts and administer files with executors/lawyers/planned giving experts, paying close attention to legal requirements, regulations, family laws, etc.
- Acts as liaison with internal and external stakeholders, including timely telephone support and inquiries from lawyers, executors, trust officers, next-of-kin, and liaison with bequest administrators at other charitable organizations.
- Administers estates, charitable gift annuities, charitable remainder trusts, gifts of securities, life insurance policies, and endowments in an accurate and timely fashion, ensuring the best interests of the organization are met.
- Understands and leverages Arthritis Society Canada's suite of planned giving tools and products to help achieve annual and five (5)-year revenue goals.

## Stewardship (ongoing)

- In response to major and planned gifts received, coordinate and facilitate prompt and immediate gift acknowledgment and receipting.
- Main staff lead in Quebec/Atlantic to manage, monitor and administer all stock gift donations, working closely with our stockbroker and/or donors' stockbrokers as needed to sell every gift of shares within our Policy.
- Coordinate stewardship, cultivation and solicitation mailings and custom packages as needed or mandated by the donor.
- Assist in creating impact pieces used in securing, renewing and upgrading relationships with donors and potential donors.
- Works with the Manager, Donor Stewardship & Engagement to ensure a centralized stewardship and recognition program throughout Quebec to support and promote relationship building and long-term relationships through program logistics and recognition systems.
- Work closely with donor and data services to ensure that all donations from active and prospective donors are accurately entered in Raiser's Edge, acknowledged and/or quickly routed to the appropriate staff solicitor for timely recognition and follow-up.



## Qualifications, Experience & Skills:

- Five (5) years of progressive revenue development experience, gained from a similar fundraising environment, working directly and successfully with donors to build giving capacity.
- Post-secondary education in fundraising, business or a related field.
- Outstanding relationship-building skills, with demonstrated ability to deliver a high level of customer service to donors, volunteers and other contacts throughout the relationship cycle including cultivation, solicitation and stewardship.
- Driven, energetic, self-motivated and results-oriented passionate fundraiser, with a passion for philanthropy.
- Strong interpersonal skills, with the ability to work in a collaborative style with local and nationwide colleagues and stakeholders, both in-person and remotely.
- Demonstrated ability to manage multiple priorities.
- Ability to use discretion, judgment and tact in handling highly sensitive, confidential information related to donor information.
- Exceptional written, oral and presentation skills. **Bilingual (English and French) language skills essential.**
- Strong level of comfort and experience with donor databases (Raiser's Edge experience preferred) and Microsoft Office.
- AFP and CAGP membership in good standing an asset.



## Working Conditions

- This position is **Designated**. This means you will work at least 2 days a week from our **Montreal** office and the rest of the days remotely/from home. The exact days you are required to work from our office will be determined by your supervisor. There will be times throughout the year when you are required to travel to Toronto for in-person meetings, events, retreats and other opportunities to connect and collaborate.
- Must have access to a vehicle, valid driver's license, insurance and able to travel within Quebec.
- Role located in Montreal.

- Requirement to be flexible and work additional hours to support business needs, where necessary.



### Some Highlights of What we Offer:

- **Performance Rewards:** Pay for performance incentive program.
- **Health & Wellness:** Extended healthcare benefits (including dental, vision, prescription drugs & disability coverage), choice of healthcare spending account and/or healthy living account, virtual 24/7 healthcare access & discounted fitness membership.
- **Time-Away Programs:** Vacation (at least 3 weeks), personal days, holiday closure & summer hours.
- **Ways of Working:** Working with us doesn't have to mean working in an office to have an impact. Our dedication to enabling you to flourish means that you can have choice and flexibility in where you work and live, subject to the needs of your role, the people you serve and our requirements. We have a hybrid working model, with home and office-based options available. We will always list a primary location which will be where you go for in-person teamwork.
- **Retirement Planning:** DCPD whereby you contribute 4% of earnings & we match this with 5%, and a convenient reduced-fees Group RRSP scheme.



### Apply Now:

If you are interested in, and qualified for, this exciting opportunity, please submit a cover letter and resume to [hr@arthritis.ca](mailto:hr@arthritis.ca). We thank all applicants for their expression of interest, however only those selected for an interview will be contacted.

Interested in a different role or know someone that would be a great fit for our team? We are creating an organization that is an exceptional place to work and volunteer. You are encouraged to visit our official careers site at [www.arthritis.ca/careers](http://www.arthritis.ca/careers) where you can view all our current job opportunities across Canada and learn more about why you should join our team to help extinguish arthritis for good!